

# The Kaplan Leadership Initiative Evaluation Report

Findings from the Second Cohort 2019–2020  
and Follow-up of the First Cohort 2018–2019

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# Abstract

## Background

The Kaplan Leadership Initiative (Kaplan program) is the first international JDC program that has set itself the goal of developing leadership in Jewish communities in Europe, the former Soviet Union (FSU) and Latin America (LATAM). The program is designed for professionals at mid-level positions in Jewish communities who are aspiring to strengthen their influence and leadership, particularly in their own organizations and communities. It focuses on providing tools and knowledge in four areas: community development, leadership, Jewish content and context, and management. The program plan comprises three program cohorts, each built on three regional seminars and one global seminar hosted by an academic institution in the USA, as well as activities and tasks in between the seminars. This report presents the main findings on the second cohort of the program (2019-2020), which numbered a total of 45 fellows from all three regions, and a follow-up of the first cohort (2018-2019), 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 the establishment of contact and networking with program fellows. These ultimate goals are examined among the graduates of the first cohort.

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

## 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 the regions, yet sensitive to the distinctive characteristics of each. Each evaluation cycle covers three main stages (before, during and after the program). The evaluation includes quantitative tools (self-administered questionnaires) and semi-structured interviews with fellows and program staff, as well as observations at regional seminars and the global seminar. A special effort is made to maintain sensitivity to unique cultural and linguistic aspects in the development of the tools while collecting the data.

## Key Findings

The fellows expressed satisfaction with the implementation of the program and the organization of the regional seminars. Ninety-two percent (12) of the European fellows, 85% (11) of the LATAM fellows and 72% (10) of the FSU fellows reported that the program had met all or most of their expectations in a number of key areas: networking; the acquisition of tools, skills, and knowledge; and personal and professional development. The European fellows cited Jewish knowledge as well.

All the European fellows (13), 93% (13) of FSU fellows and 92% (12) of the LATAM fellows had changed or were planning to change the content or practices of their work as a result of their participation in the program. The areas targeted for change were presentation techniques and emotional intelligence in Europe; team management, leadership and fundraising in the FSU; and leadership, management, strategic planning and teamwork in LATAM.

Comparison of the findings for Cohort 1 and Cohort 2 showed that overall, the program has managed to maintain the relatively high levels of satisfaction in both regions that took part in the first cohort (Europe and FSU).

The follow-up of Cohort 1 revealed that most of the program graduates work in the Jewish community (69%, 20): 52% (15) fill the same organizational position they held at their entry into the Kaplan program, and 17% (5) have been promoted; 31% (9) no longer work in the Jewish community; 67% (16), make use of the knowledge and skills they have acquired in the areas of management and leadership to a great or a very great extent; 54% (13) use the knowledge and tools in the field of community and 42% (10) use the Jewish learning and texts they have acquired in their everyday work. Most of the graduates

(83%, 20) are part of their regional network, which is a platform mostly for personal communication and friendships.

## **Issues to Consider for Future Implementation**

Several recommendations emerged from the study:

- To adhere to the four program contents – community development, leadership, Jewish content and context, and management – in all regions, and to coordinate the work to achieve more alignment between groups
- To set a program outline, to communicate it to the participants and connect the activities to the outline during reflection and summary sessions
- To place greater emphasis on community development, integrated Jewish learning, fundraising and teambuilding;
- To invest more in creating a global network and an active alumni network
- To enable more peer learning; and to upgrade the quality and volume of activities in between seminars.

# Executive Summary

## Background

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

Kaplan program 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 designed for three cohorts: 2018-19, 2019-2020, and 2021-22. Each cohort has regional programs, including three regional seminars and one global seminar in the USA in cooperation with an academic institution. In between the seminars, learning activities are conducted.

This report presents the findings on the second cohort, i.e., 2019-2020, numbering 45 fellows from three regions: Europe, FSU and LATAM, and the findings of a follow-up study of the first cohort – 29 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 the establishment of contact and networking with program fellows. These ultimate goals are examined among the graduates of the first cohort.

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

## Study Methodology

A mixed methods approach was used to obtain in-depth quantitative and qualitative input. 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 the study tools and the interpretation of the findings.

Our data collection for the second cohort (45 fellows) used a number of tools: online self-report surveys (in three languages) before the program started and at the end; in-depth, qualitative interviews midway through the program and at the end; interviews with fellows at the global seminar; observations (at the regional and global seminars); analysis of documents produced by the program and meetings with program staff.

Data collection for the first cohort of European and FSU fellows (29 fellows) used online self-report surveys (in two languages).

**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**

Data Collection Method	Source of Information	No. of Respondents
<b>Second cohort:</b>		
Pre-program online self-administered questionnaire (before the first seminar)	Program fellows	45
Mid-program semi-structured telephone interviews	Program fellows	15
Observation at the regional seminars in Israel	1 day for each region	
Observation at the global seminar	9 days	
Informal interviews at the global seminar	Program fellows	20
End-program online self-administered questionnaire (a week after the final regional seminar)	Program fellows	40
End-program semi-structured telephone interviews	Program fellows	16
Ongoing meetings and updates	Program staff	35 meetings
Analysis of documentation	30 documents	-
<b>First cohort:</b>		
Post-program online self-administered questionnaire	Program fellows	24

# Study Findings

## Background Characteristics of Program Fellows

Nearly all the fellows met the admission criteria regarding employment and professional experience. The LATAM group was older than required and lacked the necessary command of English. LATAM fellows 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 all regions. The fellows hailed from communities of very different sizes, with a wider range in Europe than in the FSU and LATAM.

## Attendance and Satisfaction with the Program: Seminars and in-between Activities

(absolute numbers are given next to the percentages, in parentheses)

Most of the fellows attended the regional seminars and 89% (40) attended the global seminar. There were four dropouts from the program, two from Europe, one from the FSU and one from LATAM.

The LATAM group was satisfied with the global seminar, and less satisfied with their regional seminars. In the other two regions, the fellows were much more satisfied with their regional seminars than the global seminar.

Several global and regional webinars were offered, and most of the fellows from all the regions (92%, 41) attended at least two during the program, although all of the webinars fell short of their potential benefits in terms of interaction and networking; the European and LATAM fellow worked with mentors (85%, 11 and 100%, 13, respectively), 100% (14) fellows from the FSU worked with coaches and were much more satisfied than their peers; all of the fellows completed homework assignments; many FSU fellows (71%, 10) and a few LATAM fellows (23%, 3) took English lessons; European and LATAM fellows also participated in activities tailored to their region: 77% (10) of the European fellows participated in *havruta* (paired) learning in between the seminars; all the LATAM fellows worked in groups on a final project. In all of the regions, the fellows expressed disappointment with the small amount of activities between the seminars.

## Program Contribution

We examined several aspects of the program's contribution: the acquisition of knowledge and tools; the fellows' perceptions and motivation to pursue a career in the Jewish community; networking; and the application of the new knowledge and tools.



The program’s contribution to the development of the fellows as Jewish professionals was different in each region. **In Europe**, the main influences were on “understanding your strengths and challenges as a Jewish professional” (85%, 11), “strengthening your wish to build a professional career in the Jewish community” (85%, 11) and “helping you recognize new opportunities in your role or in your organization” (85%, 11). **In the FSU**, the program had a strong impact on the fellows in regard to “understanding your strengths and challenges as a Jewish professional” (92%, 13), and at lower rates, to “helping you think about the next steps in your professional journey” (79%, 11). **In LATAM**, the program highly contributed to “helping you think about the next steps in your professional journey” (92%, 12), and also to “strengthening your wish to build a professional career in the Jewish community” (84%, 11), “helping you formulate a leadership approach that suits you personally” (84%, 11), and “helping you better understand what issues you want to promote in your community” (84%, 11).

The pre-program rates of self-perceptions as Jewish professionals were higher in the FSU and LATAM than in Europe. In all regions, there was an increase in the fellows' self-perceptions as Jewish community leaders. There was a notable increase among the fellows from Europe in their self-perception as Jewish professionals, from 77% (10) before the program to 100% (13) at the end.

The regional networks were well formed, but the global network did not yet develop. This was due to mainly to lack of time and opportunities during the global seminar and in between seminars, as well as language and communication gaps.

While it is too early to examine the program’s impact on their work in the field, all the European and most of the FSU (93%, 13%) and LATAM fellows (92%, 12) said that they had changed or were planning to change their work content or practices as a result of their program participation. The areas targeted for change were consistent with the different emphases of the regional seminars. For the European fellows, it revolved around presentation techniques and emotional intelligence; for FSU fellows – team management leadership and fundraising; for LATAM fellows – leadership and management, including strategic planning and teamwork.

### **Program Organization**

Most fellows from all three regions expressed satisfaction with the amount of time devoted to community development: 39% (5) of European, 30% (4) of LATAM and 29% (4) of FSU fellows thought that more time could have been devoted to this area of knowledge. Nearly all the LATAM group

(92%, 12) and most of the FSU group (79%, 11) were satisfied with the time allotted to developing management skills. Among the European group, only 46% (6) were satisfied with the time allotted and most of the group wanted more.

All the groups were mostly satisfied with the amount of time allocated to leadership; many of the European fellows (84%, 11) and two-thirds of the FSU fellows (64%, 9) were satisfied with the amount of Jewish learning offered, while most of LATAM fellows (62%, 8) thought that not enough time was allocated this topic.

The program consists of different types of learning methods, including discussions, lectures and presentations, *beit midrash* learning of Jewish texts, workshops, site visits etc. The European fellows were pleased with the amount of time dedicated to text learning (85%, 11). The FSU fellows were pleased with the amount of time dedicated to lectures and presentations (93%, 13), study tours (86%, 12) and text learning (79%, 11). The LATAM fellows were pleased with the amount of time dedicated to lectures and presentations (92%, 12), study tours (84%, 11) and informal interaction at breaks and free time (92%, 12). Fellows of all three regions thought that not enough time was dedicated to workshops, peer learning, and networking, throughout the program.

All the groups agreed that the intervals between the seminars and duration of each seminar day were appropriate, although they felt that more breaks were needed in between the activities. The groups differed in their satisfaction with the amount of program activity between the seminars. Most of the Europeans felt that the amount of program activity between the seminars was appropriate (84%, 11), almost half of the LATAM (46%, 6) and only a third of the FSU (29%, 4) fellows reported that there were enough activities between the seminars.

All groups reported high levels of satisfaction with the organization of the program and the guest lecturers. The European and FSU groups were highly satisfied with the responsiveness to fellows' requests (100%, 13 and 93%,13, respectively); the LATAM group was less satisfied with the program's responsiveness (77%, 10). The European and FSU groups were highly satisfied with the flexibility in the structure and agenda of the program (93%, 12 and 86%,12, respectively) compared to 46% (6) in LATAM. Lower rates of satisfaction were found in the European group regarding program materials (54%, 7), and in LATAM regarding facilitation and connection in activities between seminars (54%, 7). Overall, the LATAM group expressed less satisfaction with the program organization than the groups in the other regions.

## **Expectations from the Program**

Most of the fellows in all three regions felt that the program met all or many of their expectations, although, 28% (4) of the FSU and 15% (2) of the LATAM fellows noted that the program met only some of their expectations. All groups said that the main expectations realized were networking and the acquisition of tools and skills. The European and FSU fellows also noted personal and professional growth. The European fellows mentioned Jewish knowledge.

## **Overall Program Evaluation**

Most of the fellows from all the regions felt that the program included contents that were relevant to their work, and that the program reflected the professional issues they were dealing with. Yet, while 85% (11) of the European fellows said that the program included themes that were new to them, only 62% (10) of LATAM fellows and 43% (6) of FSU fellows reported the same.

All the fellows noted that they would somewhat or highly recommend the program to others, although almost all the Europeans (92%, 12) would highly recommend the program, compared to 79% (11) of the FSU and 69% (9) of the LATAM fellows.

## **The Fellows' Recommendations**

The fellows' recommendations focus on the introduction to the program, the regional and global seminars, activities in between seminars, contacts and networking, and the conclusion of the program and its aftermath. According to the fellows, the regional groups should be more homogeneous in terms of education, training and experience of the fellows (FSU) and in terms of their position within the Jewish community (Europe), and more diverse in terms of country of origin and gender (LATAM); the program outline should be clarified before and during the program; the seminars should include more peer learning, site visits, case studies, workshops, and work in small groups, and address more topics such as management, team development and community development. The fellows want more activities in between the seminars, with more follow-up by program staff and more interaction with their peers from other regions.

## **Comparison between Cohort 1 and Cohort 2**

### **Changes Made to the Program after Cohort 1**

The program underwent significant programmatic changes following the experience gained from the first cohort and the evaluation findings, as well as personnel changes. Most of the contents of the regional seminars were new and there were changes in the global seminar. The second cohort also included a third region, LATAM.

### **Comparison between the Cohorts**

We examined the difference between cohorts according to the two regions in Cohort 1 – Europe and FSU – since the considerable differences between the implementation of the program in each region limited our ability to compare one region to another. The differences in the satisfaction and contribution of the program were examined through six indexes: Development as a Jewish professional; self-perception as a Jewish professional; expansion of knowledge in the program's four content areas; overall assessment of the program; program organization; and program methods. Overall, it is apparent that the program maintained the relatively high levels of satisfaction in both regions.

In Europe, there was improvement in four indexes: Self-perception as a Jewish professional, development as a Jewish professional, expansion of knowledge in the program's four content areas, and overall assessment of the program. Two indexes were rated lower in the second cohort than in the first cohort: program organization and program methods. In the FSU, there was improvement in the fellows' rating of development as a Jewish professional, and a slight increase in their self-perception as a Jewish professional. Expanding knowledge in the program's four content areas was rated lower in the second cohort than in the first cohort.

## **Cohort 1: Post Program Findings**

### **Evaluation Goals and Methodology**

The survey conducted among the graduates aimed to examine whether they were still working in the Jewish community and if so, in which positions; whether they were making use of the knowledge and tools they had acquired in the program and were actively engaging with one another. Data collection was challenging, but eventually we obtained a response rate of 83%. Basic information about the current employment of the non-responders was obtained by program staff.

## **Current Employment**

Most of the program graduates work in the Jewish community: 52% (15) are in the same position, 17% (5) have been promoted. Around one third, 31% (9) no longer work in the Jewish community. Five of them are involved in the community in a committed, voluntary position.

## **Program Impact**

The various aspects of the program – specific learning content and methods, learning about different communities, feeling part of a peer group of Jewish professionals with similar challenges and needs, mentoring and personal and professional development – affected the graduates in different ways. Over two-thirds of the graduates (67%, 16) implement the knowledge and skills they have acquired in the areas of management and leadership to a great or a very great extent; about half (54%, 13) use the knowledge and tools in the field of community, and 42% (10) use the Jewish learning and texts they have acquired in their everyday work.

The graduates reported little application of their knowledge and skills in the areas of community development and integration of Jewish content. This is consistent with their feedback at the end of the program, that not enough time was devoted to these areas.

The main changes in their work as Jewish professionals following the program were: Changes in strategic vision and perception, increased self-confidence, developing a network, concrete skills and tools, focusing on the community, and developing self-perception as a Jewish professional.

## **Network**

According to the findings, regional networks have evolved, but no global network has developed. The graduates offered various suggestions to enhance the network, including activities that should take place during the program and the establishment of a formal and active alumni network after the program.

## **Issues for Consideration Regarding Future Implementation of the Program**

Based on all the study findings, we recommend action in the following areas:

### ***Implementation of Cohort 2***

- **Program management and coordination.** It is important to focus on all four content areas – community development, leadership, Jewish content and context, and management – in all the

regions and to coordinate the work to achieve more alignment between groups. Regional staff could benefit from mutual learning, sharing experiences and replicating successful activities.

- **Setting a program outline and communicating it:** It is advisable to draw up an outline, to communicate it to the participants, and to connect the activities to the outline during reflection and summary sessions. Organizing the knowledge and learning may facilitate the use of information in the future and deepen the impact of the program over time.
- **Program contents and methods:** Changes need to be made in the integration of Jewish contents, additional time should be dedicated to community development and fundraising methods by means of workshops, case studies and peer learning.
- **The global seminar:** The global seminar requires a very large investment of resources. In view of the fellows' feedback, it is advisable to rethink how to conduct the seminar, ahead of the next cycle.
- **Activities between the seminars:** Fellows requested an increase in the volume of activities and clarification of the framework of the activities. It is important to follow up on the implementation of the activities and make adjustments when necessary. Also, coaching should be considered instead of mentoring in all regions.
- **Developing the network:** In addition to the resources invested in the program, we suggest devoting resources to the construction of a global peer network that will operate continuously and frequently for an extended period. Belonging to an active network may also influence the fellows' decision to continue in their career as Jewish professionals.

### ***Cohort 1***

- **Reconsider the programs' expectations regarding the fellows' long-term employment in the Jewish community** considering the realities of their communities, the program limitations and their needs for support that are not met.
- **Maintaining an active network** can help the graduates handle their challenges and increase their sense of belonging to their peer group of Jewish professionals, and perhaps prolong their commitment to their career in the Jewish community.

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