Since 2016, the Schusterman Family Foundation has engaged Learning for Action (LFA) as the evaluation and learning partner for the Schusterman Fellowship. As part of that work, LFA designed a theory of change (see following slide) and conducted several standalone evaluations of the Fellowship program and the Senior Fellows program. 2019 marks the third year of data available on the Fellowship and the second year of data on the Senior Fellows program. For the first time, these data are reported together so the Schusterman Foundation can examine trends and begin to explore some early longitudinal results from the Fellowship programming. This report thus summarizes the findings of the impact of the first three years of the Fellowship on Fellows while also providing an exploration of the longer term impacts of the Fellowship and Senior Fellows programming.

Data Representation in this Report
As the evaluation has evolved over the past three years, LFA has adjusted its inquiry to refine the approach and to address emergent areas of interest. At this time, data is available for Cohorts 1-3 Fellows (surveys and interviews approximately 3-4 months after the end of the Fellowship), and from the first two cohorts of Senior Fellows one-year after the end of the Fellowship. As such, the data points and sample sizes throughout the report may vary as they reflect the data available.

This report presents findings that follow the Schusterman Fellowship’s Theory of Change, which hypothesizes that the program will have an impact on the following:

- Fellows
- Organizations
- The Jewish Sector

The report concludes with reflections on the programming—how the components have been successful and where there is room for improvement—and recommendations to strengthen the Fellowship and Senior Fellows program.
Schusterman Fellowship Theory of Change

The Fellowship Theory of Change reflects the ultimate goals and outcomes the Fellowship seeks to achieve, and the strategies for achieving these goals. The results of the evaluation are mapped to Fellow outcomes, Jewish sector outcomes, and impact using the icons that appear at the top of the Theory of Change below.

THE GOAL: The Schusterman Fellowship aims to create a powerful pipeline of leaders to fill key positions of influence in the Jewish sector.

Strategies
- **Strategy 1**: Develop individual leadership capacity
- **Strategy 2**: Build a network of leaders
- **Strategy 3**: Create organizational impact

Fellows will...
- Build leadership capacity
- Enhance credibility
- Foster their own commitment and sustainability
- Receive promotions
- Fill positions of influence
- Provide mentorship to others
- Create a pipeline of leaders

Jewish Sector Outcomes
- The Jewish sector will attract and retain high quality talent

Impact
- The sector is better situated to respond to ongoing and emergent priorities in the Jewish community
Executive Summary

Summary

This report includes data from surveys and interviews conducted approximately 3-4 months after the end of the Fellowship for Cohorts 1-3 Fellows as well as one year after the end of the Fellowship for the first two cohorts of Senior Fellows.

Overview of Findings

Fellows experience a great deal of career movement during and within one year of the Fellowship and Senior Fellowship experiences.

- 82% moved into Senior Executive roles
- 30% moved to a new organization with increased influence
- 37% attained Board leadership roles

Fellows and their supervisors attribute positive changes to the Fellowship.*

- 90% report stronger understanding of leadership weaknesses
- 72% report meaningful collaboration with other Fellows after Fellowship
- 67% report positive change in organization
- 49% report increased influence in Jewish sector
- 59% invited to sit on a board, advisory committee, or task force.

Fellows remain committed to future lay leadership, but commitment to professional role in the sector decreases a year after the end of the Fellowship.

Half of Senior Fellows say they increased their influence in the Jewish sector at the end of the Fellowship.

Recommendations

Reimagine the Organizational Change Initiative/Change Inquiry

Define goals through a Theory of Change process for the Senior Fellows Network

Provide more infrastructure to support Senior Fellows Network

*The data presented here includes the Fellow survey responses totaling the “Very much” and “Extremely” response options.
Impact on Fellows

- Career & Leadership Advancement
- Leadership Shifts
- Commitment to the Jewish Sector
The Fellowship Supports Career Advancement

From before the start of the program to one year after completion of the Fellowship, 14 (21%) Fellows not previously in Senior Executive positions moved into Senior Executive positions either through a promotion within their current organization or through a move to a new organization.

Movement to New Organizations Affords Opportunities

30% of all Fellows accepted a position with a new organization since completing the Fellowship.

These Fellows moved to organizations that either afforded greater opportunity to advance their careers in the future, held greater influence in the sector, or provided advancement to a Senior Executive position.

My new position was a "product" of my growth as a Fellow. During the program, I learned to identify what worked and what didn't at my previous job. I observed what I could change and what I could not ... With the unbelievable support of my coach and my colleagues from the Fellowship, I was able to identify this new position and go through the interviewing process that took months with a new sense of awareness and confidence.

– Senior Fellow
At the close of the Fellowship, Fellows reported substantial shifts in their leadership as a result of their Fellowship.

- The shift rated as the most highly influenced by the Fellowship experience is a stronger understanding of their own weaknesses.
- Other highly rated shifts include greater confidence, focus, capacity for inspiring others, and more tools and practices to sustain their work long-term.

Fellows Experienced Positive Shifts in Leadership Because of their Fellowship Experience

I have a stronger understanding of my own weaknesses. (n=59) 4.3

I have more tools and practices to continue my work in the Jewish sector for the long-term. (n=81) 4.1

I am more confident in my leadership abilities. (n=59) 4.1

I am more able to use my voice to share my vision to mobilize and inspire others. (n=80) 4.1

I am more clearly focused on the change I want to create. (n=81) 4.1

Senior Fellows Experienced Leadership Changes as a Result of their Fellowship Experience*

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>Work/life balance, self care</td>
<td>4.6</td>
</tr>
<tr>
<td>Self-awareness</td>
<td>4.4</td>
</tr>
<tr>
<td>Presence, mindfulness</td>
<td>4.4</td>
</tr>
<tr>
<td>Field presence</td>
<td>4.4</td>
</tr>
<tr>
<td>Confidence</td>
<td>4.0</td>
</tr>
</tbody>
</table>

One year after the conclusion of the Fellowship, Senior Fellows continued to note positive leadership shifts in as a result of their Fellowship and Senior Fellow experiences.

- Senior Fellows noted shifts in work life balance as the most highly influenced by the Fellowship and Senior Fellows experiences.
- Self-awareness, presence and mindfulness, and field presence were also shifts experienced by Senior Fellows.

Fellows and Senior Fellows almost universally reported an increase in confidence as a result of the Fellowship. Increased confidence was similarly noted by Fellows’ supervisors, who cited enhanced effectiveness, vision, and management among Fellows after completing the program. A number of Fellows reported that the confidence that they gained in their skills as leaders also supported them in feeling more confident in leadership in other areas of their lives, such as speaking up for causes and issues that they feel passionate about. When asked which components of the Fellowship helped to foster these leadership qualities, Senior Fellows cited coaching, relationships with other Fellows, and CLDP funding that provided the space and support needed to stretch and strengthen their leadership skills.

*Senior Fellows were asked to self select the leadership changes they have experienced as a result of the program. Learning for Action themed the responses and included the top 5 leadership changes in this chart.

Note on means scale: These survey items are based off a Likert scale including: “Not at all” 1, “Slightly” 2, “Somewhat” 3, “Very much” 4, and “Extremely” 5.
Commitment to long-term lay leadership in the Jewish sector was high both immediately after program completion (74%) and one year later (73%).

High levels of commitment to long-term professional leadership in the Jewish sector dropped from 79% at the end of the Fellowship to 62% among Senior Fellows within a year of completing the Fellowship. Senior Fellows attributed this change in part to their Fellowship experience expanding their view of the possibilities available to them and broadening the scope of their leadership potential. With a greater sense of possibility for their future careers and some distance from their Fellowship experience, Senior Fellows considered options both in and outside the Jewish sector that they may not have previously explored.

While commitment to long-term professional leadership in the Jewish sector decreased one-year post-program, when compared to a Leading Edge national survey of employees in the Jewish sector who were asked about their interest in advancing to a senior role in the Jewish sector, the rate of commitment among Schusterman Fellows one-year post program was higher.

The Schusterman Family Foundation embraces and honors the idea of sector permeability and sees the benefit of Fellows leaving and returning to the Jewish sector at various points in their careers.

From the end of the Fellowship to one year after the Fellowship, the proportion of Fellows who reported that they are “very much” and “extremely” committed to serving in the Jewish sector dropped for professional leadership roles but remained high for lay leadership roles.
Impact on Organizations

- Organizational Change
- Collaboration
Positive Organizational Change

Fellows reported positive changes in their organizations attributed to the Fellowship including:

- More professional development, mentoring, and coaching opportunities for employees
- New or improved feedback and review processes
- Changes to/improvements in staff culture
- Improved organizational or strategic planning

In addition to the positive organizational changes noted by Fellows across all three years, Cohort 3 Fellows also noted the following positive organizational shifts they attribute to skills or materials brought back from the Fellowship:

- Greater focus on issues of Diversity, Equity, and Inclusion (DEI) within their organization
- Junior staff taking on more responsibility
- New or improved organizational learning

Supervisor Feedback on Organizational Change

A few supervisors of Cohort 3 Fellows noted that their organizations experienced important changes this year, and the increased strength in leadership skills has helped the Fellows to facilitate these organizational change processes. Supervisors report that Fellows were able to build trust with staff, model positive and effective leadership, and think strategically at an organization-wide level which made organizational transitions and developments more straightforward.
Collaborations Fostered by the Fellowship

By bringing Fellows together regularly and promoting interaction through small group discussion and activities, the Fellowship fostered strong relationships among Fellows. The program highlighted the value in maintaining a connection and approaching one another for support and professional development.

- Nearly three-quarters of Fellows collaborated in a meaningful way with other Fellows during the Fellowship (70%, and on average with three other Fellows) and in the year following the end of their Fellowship experience (72%, and on average with four other Fellows). Senior Fellows also noted collaborations with members of other cohorts, though to a lesser extent than with members of their own cohorts. Fellows’ supervisors noted that Fellows’ participation in the Fellowship served to both strengthen existing connections with other organizations and develop connections with new organizations.
- In addition to Fellows collaborating on an individual level, at the close of the Fellowship, nearly one-fourth (22%) of Fellows report that their Fellowship experience has led to collaboration with the organizations of other Fellows.

22% of all Fellows report that their experience as a Fellow or Senior Fellow has contributed to collaboration among Fellows’ organizations.

72% of Senior Fellows have collaborated in a meaningful way with other Fellows within a year after the end of the Fellowship.

Fellows collaborate with other Fellows in the following ways:

- **Formal organizational collaboration:** Fellows connect their organizations on projects where opportunity exists to collaborate to achieve shared goals.
- **Formal consultation services:** Fellows hire each other as consultants for their organizations.
- **Collaborating on speaking/writing/facilitation opportunities:** Fellows work together to develop presentations, webinars, papers, and articles.
- **Informal support and consultation:** Fellows treat the network as a learning community and connect informally to develop ideas and strategies.

On average, Fellows collaborated in a meaningful way with four other Fellows in the year following the end of their Fellowship experience.

This Fellowship allowed for a number of very meaningful relationships with leaders working in pivotal and important Jewish agencies which I would likely not have had access to. By way of example, [because of Fellow connections] I began working more closely with the IAC office in Boston, connected with BBYO more directly, learned more about what the Jewish Education Project has been working on, and spent time learning with M2. There are more examples, but without question the relationships I have made stand at the very top of what I gained from the experience.

-Senior Fellow
Impact on the Jewish Sector

- Networking
- Influence in the Jewish Sector
- Board Leadership
A goal of the Fellowship is to build a network of Jewish leaders in the sector. More than three-fourths of Senior Fellows reported strong relationships within the network of Fellowship alumni. While Senior Fellows formally and informally connected and collaborated with one another informally, these connections are largely supported by formal Schusterman programming, as Fellows from Cohorts 1 and 2 reported less engagement with the network outside of Schusterman-sponsored events. This suggests that Schusterman programming and events serve a crucial role in maintaining and growing the network of Fellows and Senior Fellows.

While Senior Fellows saw the value in continuing to engage with their network of Fellows, and a majority engaged with Fellows from within their own cohort, there was more limited connection with Fellows from other cohorts. Senior Fellows cited few opportunities to meet and engage meaningfully with members of other cohorts as a barrier to expanding their connections outside of their own cohort.

The Foundation is exploring social network analysis to better understand the strength and impact of the Fellows Network.

### Senior Fellows highly value the Fellowship network, relationships, and support

<table>
<thead>
<tr>
<th>Statement</th>
<th>Not at all</th>
<th>Slightly</th>
<th>Somewhat</th>
<th>Very much</th>
<th>Extremely</th>
</tr>
</thead>
<tbody>
<tr>
<td>I feel that the Fellowship community is a network that supports and enhances my growth. (n=52)</td>
<td>6%</td>
<td>15%</td>
<td>46%</td>
<td>33%</td>
<td></td>
</tr>
<tr>
<td>I feel there is a strong sense of trust among Senior Fellows. (n=52)</td>
<td>2%</td>
<td>21%</td>
<td>46%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>I have strong personal and/or professional supportive relationships with other Fellows. (n=52)</td>
<td>4%</td>
<td>21%</td>
<td>44%</td>
<td>31%</td>
<td></td>
</tr>
<tr>
<td>I am connecting with Fellows outside of Schusterman-sponsored events. (n=52)</td>
<td>6%</td>
<td>17%</td>
<td>35%</td>
<td>27%</td>
<td>15%</td>
</tr>
<tr>
<td>I utilize the network to connect to Fellows in other cohorts. (n=52)</td>
<td>23%</td>
<td>37%</td>
<td>29%</td>
<td>8%</td>
<td>4%</td>
</tr>
</tbody>
</table>

I believe that successful collaborations (or engagement efforts in general) stem from and begin with relationships. This Fellowship allowed for a number of very meaningful relationships with leaders working in pivotal and important Jewish agencies which I would likely not have had access to.

– Senior Fellow
In addition to advancing their leadership skills and creating positive changes in their organizations, Schusterman Fellows advanced their influence in the Jewish sector. One-third of Cohort 3 Fellows reported that they substantially increased their influence in the Jewish sector at the close of the Fellowship.

An even greater number of Senior Fellows, nearly half, reported that their Fellowship increased their influence in the Jewish sector one year after the Fellowship. Senior Fellows employed in the Jewish sector felt this change more strongly than Fellows in the secular sector.

The experience both empowered and challenged me to be more thoughtful about the type of change I wanted to see in the Jewish world through my work, and through that crystalizing I became a more intentional and clear leader locally. That translated to more successful work in my community, which resulted in more national attention ... and ultimately allowed me to have a larger national presence and voice.

– Senior Fellow

33% of Cohort 3 Fellows report that they have very much (27%) or extremely (7%) increased their level of influence in the Jewish sector by the end of the Fellowship.

49% of Senior Fellows believe they have very much (43%) or extremely (6%) increased their level of influence in the Jewish sector in the year following the Fellowship.
In addition to advancing Fellows’ careers, the Schusterman Fellowship supports Fellows in lay leadership roles. Fellows have expanded their influence in the sector by assuming Board leadership roles in Jewish sector organizations. The graphic below shows the number of Fellows from Cohorts 2 and 3 who held Board leadership roles before the Fellowship started, the number who held a leadership role by the end of the Fellowship, and the number of Fellows who held more than one Board leadership role.*

Before the Fellowship
9 out of 59 Fellows held a Board leadership role before the start of the Fellowship.

At the end of the Fellowship
An additional 10 Fellows for a total of 19 out of 59 Fellows held at least one Board leadership role either during or by the end of the Fellowship.**

Multiple Board leadership Roles at the end of the Fellowship
10 out of 59 Fellows held more than one Board leadership role.7

59% of Fellows have been invited to sit on a board, advisory committee, or task force since the start of the Fellowship.

More than half of Fellows report they are invited to participate in lay leadership roles during and after the Fellowship. Fellows and Senior Fellows attribute some of these invitations to their increased visibility and credibility as a result of the Fellowship.

*Board leadership roles and Senior Board leadership roles are combined in this data
**Cohort 1 Fellows were removed from this data point in order to create a comparable data point (Cohort 1 Fellows were not surveyed about multiple Board leadership roles). The total number of Fellows included is n=59 (Cohorts 2 and 3). 12 cohort 1 Fellows held at least one Board leadership role since the start of the Fellowship. When combined, 37% of all Fellows hold Board leadership roles (n=83)
Benchmarking the Fellowship
A survey conducted by LFA of evaluation and impact reports released by leadership focused fellowship programs found that the **Schusterman Fellowship program assesses performance based on metrics comparable to those of their peers.**

<table>
<thead>
<tr>
<th>Schusterman Outcomes</th>
<th>Other Fellowship Program Outcomes</th>
</tr>
</thead>
<tbody>
<tr>
<td>82% of Schusterman Fellows hold Senior Executive roles one-year post-program.</td>
<td>• Post-program, 95% of New Sector Alliance(^2) alumni say they are positioned to move forward in achieving their career goals.</td>
</tr>
<tr>
<td></td>
<td>• One-year post-program, 38% of Pipeline Project(^1) Fellows have obtained new senior positions, such as Executive Director and Senior Manager.</td>
</tr>
<tr>
<td>On average, one-year post program, Schusterman Fellows reported a mean average of 4.6(^*) for work/life balance and self care regarding their greatest leadership change as a result of their Fellowship experience.</td>
<td>• A ten-year survey of all LeadersSpring(^4) Fellows showed that 97% demonstrate greater levels of excellence in their leadership and management performance.</td>
</tr>
<tr>
<td></td>
<td>• 86% of all LeadersSpring(^4) Fellows report achieving greater work/life balance.</td>
</tr>
<tr>
<td></td>
<td>• Of all Durfee Sabbatical(^3) participants between 2007 and 2017, over 80% of Durfee reported that work/life balance improved after the program in a 2017 survey.</td>
</tr>
<tr>
<td>One-year post-program, 62% of Fellows are committed to serving in long-term professional leadership in the Jewish sector. 73% of Fellows are committed to serving in long-term lay leadership in the Jewish sector.*</td>
<td>• 100% of Durfee Sabbatical(^3) participants remained in the nonprofit or public sectors at a ten-year evaluation of the entire participant population.</td>
</tr>
<tr>
<td></td>
<td>• Post-program, 100% of New Sector Alliance(^2) Fellows plan to spend the next 5 to 10 years working for an organization or role that supports the greater social good.</td>
</tr>
<tr>
<td></td>
<td>• A thirty-year impact report of all Echoing Green(^5) Fellows shows that 80% are still in the social sector.</td>
</tr>
<tr>
<td></td>
<td>• At a ten-year evaluation of all Durfee Sabbatical(^3) participants, 25% took a leadership role in another organization in the same field.</td>
</tr>
<tr>
<td>67% of all Fellows report that their experience as a Fellow or Senior Fellow has contributed substantially to positive change in their organization.</td>
<td>• Post-program, 100% of New Sector Alliance(^2) Fellows felt they made a positive impact on the beneficiaries of their host site.</td>
</tr>
<tr>
<td></td>
<td>• On average, one-year post-program, Pipeline Project(^1) Fellows report that their participation in the Fellowship led to little or moderate organizational improvement.</td>
</tr>
<tr>
<td>One-year post-program, 72% of Senior Fellows have collaborated in a meaningful way with other Fellows.</td>
<td>• At a ten-year survey of all LeadersSpring(^4) Fellows, 95% report developing new partnerships.</td>
</tr>
<tr>
<td></td>
<td>• In a thirty-five year impact report of all Ashoka(^6) Fellows, 45% report new partnerships and collaborations with other Fellows.</td>
</tr>
<tr>
<td></td>
<td>• On average, each Ashoka(^6) Fellow reports collaborating with 4 other Fellows.</td>
</tr>
</tbody>
</table>

\(*\) Note on means scale: These survey items are based off a Likert scale including: “Not at all” 1, “Slightly” 2, “Somewhat” 3, “Very much” 4, and “Extremely” 5 (n=7).

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\(^1\)For more information: [https://lgbtpipeline.org/sites/default/files/docs/preparing_diverse_leaders_for_advancement.pdf](https://lgbtpipeline.org/sites/default/files/docs/preparing_diverse_leaders_for_advancement.pdf)

\(^2\)For more information: [New Sector Alliance 2018 Social Impact Report](https://www.nse2018.org)


\(^4\)For more information: [1997 - 2017 LeaderSpring Fellowship](https://www.leadersspring.org)

\(^5\)For more information: [Echoing Green 2017 Impact Report](https://www.echoinggreen.org)

\(^6\)For more information: [Ashoka Fellowship 2018 Impact Report](https://www.ashoka.org)
Fellowship and Senior Fellow Programming

- Fellowship and Senior Fellow Program Satisfaction
- Fellowship Program Components
- Senior Fellow Program Components
Fellows Report High Levels of Satisfaction with their Fellowship Experience

Over the past three years LFA has provided both formative and summative evaluation information and feedback to the Schusterman Family Foundation about its Fellowship program. The Fellowship team has taken that feedback seriously and made changes to their programming based on evaluation data. As a result, the Fellowship program appears to have hit its stride, and landed on a very successful model. There are fewer recommended changes from Cohort 3 Fellows than there were from Cohort 1 Fellows. While there are always opportunities for improvement (as noted on page 17), the program receives mostly laudatory comments from participants who overwhelmingly feel it was worth their time and effort to participate. Schusterman and LFA should continue to monitor participant satisfaction on an ongoing basis, but the focus of the Fellowship team should be to continue to deliver high-quality programming in-line with the model it has established, rather than seeking to make substantial changes in the program.

Fellowship and Senior Fellow Program Satisfaction

<table>
<thead>
<tr>
<th>Fellows²</th>
<th>Senior Fellows³</th>
</tr>
</thead>
<tbody>
<tr>
<td>98%</td>
<td>73%</td>
</tr>
<tr>
<td>n=78</td>
<td>n=52</td>
</tr>
</tbody>
</table>

98% of Fellows reported that they are “very” or “extremely” satisfied with their Fellowship or Senior Fellowship experience.

<table>
<thead>
<tr>
<th>Fellows²</th>
<th>Senior Fellows³</th>
</tr>
</thead>
<tbody>
<tr>
<td>85%</td>
<td>44%</td>
</tr>
<tr>
<td>n=80</td>
<td>n=52</td>
</tr>
</tbody>
</table>

85% of Fellows reported that the Fellowship or Senior Fellowship “met all expectations” or “exceeded expectations”.

<table>
<thead>
<tr>
<th>Fellows²</th>
<th>Senior Fellows³</th>
</tr>
</thead>
<tbody>
<tr>
<td>99%</td>
<td>75%</td>
</tr>
<tr>
<td>n=80</td>
<td>n=52</td>
</tr>
</tbody>
</table>

99% of Fellows reported that participation in the Fellowship or Senior Fellow programming was “very much worth” or “extremely worth” their time and effort.

<table>
<thead>
<tr>
<th>Fellows²</th>
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</thead>
<tbody>
<tr>
<td>97%</td>
</tr>
<tr>
<td>n=78</td>
</tr>
</tbody>
</table>

97% of Fellows reported that they are “very likely” or “extremely likely” to recommend the Fellowship to a friend of colleague.

Recommendations for Senior Fellow Program Improvements

Compared to their time in the Fellowship program, Senior Fellows reported less satisfaction with their experience as Senior Fellows. Senior Fellows indicate that greater clarity around program components and goals may support Senior Fellows’ experience. Recommendations to improve Senior Fellow programming are detailed on page 20 and include:

- Create opportunities for more in-person interaction with other Fellows
- Provide more structure around the program components
- Consider ways to better support inclusion and engagement of international Fellows
- Facilitate inter-cohort communication and interaction
- Enhance access to collaboration grants
- Refine a database of Fellows so that Senior Fellows can more easily connect with each other
<table>
<thead>
<tr>
<th>Fellowship Component</th>
<th>Impact on Fellows</th>
<th>Suggestions to Enhance Fellowship Component (*denotes a program change already in progress)</th>
</tr>
</thead>
</table>
| Customized Leadership Development Plan | The CLDP provided Fellows with opportunities they would not otherwise have to prioritize their growth and wellness. This enabled them to become more thoughtful in their growth as leaders. | • Continue to allow extended access to CLDP funds.*  
• Create a database of CLDP opportunities.*  
• Allow use of CLDP funds to support Jewish practice in life outside of work.* |
| Individual Leadership Coaching | Coaches provided invaluable support in helping Fellows work toward their goals. In turn, Fellows used the tools and examples provided by coaches in their own leadership roles. | • Provide continued access to coaches after completion of the Fellowship.*  
• Allow more individual engagement with coaches at gatherings. |
| In-person Gatherings | Fellows take knowledge and energy gained at in-person gatherings and incorporate them into their professional roles. | • Provide more time for informal connection during in-person gatherings.  
• Draw on Fellows’ expertise during in-person gatherings by inviting them to facilitate sessions.*  
• Adjust logistics to accommodate a broader range of geographies: offer non-East Coast locations and start on a Tuesday so Fellows can travel on Mondays. |
| Jewish Components of the Fellowship | Fellows’ experiences with the Jewish components of the Fellowship provided them with more tools, practices, and knowledge to begin or continue their work in the Jewish sector for the long-term. | • Include opportunities for challenging conversations on Jewish life and current issues facing the Jewish community.*  
• Deepen and integrate Jewish elements more fully into the overall experience.*  
• Create a think tank across cohorts to consider broad Jewish communal themes. |
| Network of Fellows & Senior Fellows | Fellows provide one another with support in career advancement, leadership opportunities, collaboration, volunteer opportunities, social support, and friendship. | • Provide networking opportunities for professional and lay leadership roles.  
• Facilitate new connections and collaboration within the Fellow network and the Schusterman network more broadly. Introduce Fellows and Sr Fellows to each other.*  
• Begin network development sooner by engaging other cohorts. |
| Organizational Change Initiative/Change Inquiry | Fellows found that the OCI/CI allowed them an opportunity to use their newly developed leadership skills and contributed to positive change in their organizations and communities. | • Consider requiring Fellows to dedicate a portion of coaching time to their Change Initiative.  
• Make the CI optional or allow it to incorporate changes Fellows have already undertaken.  
• Extend the timeline of the CI—consider starting sooner and allowing it to end later.*  
• Require peer review and feedback of OCI/CI proposals.  
• Create small groups of Fellows to support each other with OCI implementation. |
| Senior Fellow Program Component | Impact on Senior Fellows | Suggestions to Enhance Component  
(*denotes a program change already in progress) |
|---------------------------------|-------------------------|--------------------------------------------------------------------------------|
| **In-person Gatherings**        | Senior Fellows considered in-person gatherings one of the most impactful aspects of the experience, and found them particularly useful in continuing momentum toward growth developed during Fellowship.  
• Host gatherings across multiple Senior Fellow cohorts.  
• Coordinate regional in-person gatherings.  
• Create more space for connectivity among peers at gatherings. |
| **Formal Online Community**     | Senior Fellows indicated that the program’s formal online community (e.g., Slack) provided the least additional benefit of all of the program components.  
• Consider the goals of the formal online community and provide additional structure and communication about the purpose and goals to help Senior Fellows know how to engage. |
| **Informal Online Community**   | The informal online community provided a tool which Senior Fellows found allowed them to maintain contact and some engagement with their cohort.  
• Assess whether an informal online community could be supported with one online platform.  
• Consider alternatives to Slack, to support informal engagement for Senior Fellows.  
• Determine clear goals for each platform used as part of the informal online community, and communicate those goals to Senior Fellows. |
| **Online Learning and Virtual Gathering Opportunities** | Senior Fellows found online learning and virtual gatherings to be a meaningful part of their Senior Fellow experience, though this varied depending on content of individual gatherings and ability to attend.  
• Use virtual gatherings to make space for critical conversation on current issues.  
• Use the virtual gathering opportunities to present speakers who could only be available through the Fellowship.  
• Make online gatherings more accessible to international participants. |
| **Opportunities for Networking and Collaborating across Cohorts** | Senior Fellows saw opportunities for networking and collaborating across cohorts as particularly impactful, though it was noted that the full impact of these opportunities will take time to develop.  
• Create a database of Fellows and Senior Fellows.  
• Host informal gatherings for Senior Fellows at related conferences, such as a breakfast event at JFNA.  
• Provide more networking opportunities for those outside of the US. |
| **Collaboration Grants**        | Time proved to be the limiting factor in Senior Fellows’ ability to engage with, and therefore find meaning in, the collaboration grants.  
• Consider providing additional funding to enable Senior Fellows to connect more in-person to better facilitate collaboration. |
| **Leadership Opportunities with Current Fellows** | Senior Fellows appreciated being offered opportunities to be engaged with current Fellows and contribute to program opportunities for current Fellows.  
• Consider expanding opportunities for Senior Fellows to contribute to current programming and engage with current Fellows. |
| **Schusterman Thought Leader Promotion** | Senior Fellows valued the thought leadership promotion provided by Schusterman.  
• Share opportunities for thought leadership with specific Senior Fellows based on skills and interests.  
• Identify cohort members who are thought leadership oriented, and use them as a source of support for thought leadership endeavors of other Senior Fellows.  
• Provide ongoing thought leadership coaching and support to Sr. Fellows. |
Conclusion and Recommendations

Conclusion

- Impact of the Fellowship and Senior Fellowship Experiences

Recommendations

- Reimagine OCI/CI
- Define goals through a theory of change process for the Senior Fellow Programming and Fellow Network
- Provide more infrastructure to support Senior Fellow programming if the Foundation intends for the Senior Fellows to form a well-networked community
Summary of The Impact of the Fellowship and Senior Fellow Experiences

With three years of evaluation data, LFA and the Schusterman Family Foundation can begin to draw some conclusions about the impact of the Fellowship. Based on surveys and interviews with Fellows and Senior Fellows, LFA can point the following impacts of the Schusterman Fellowship and Senior Fellow experience:

- **Fellows move into Senior Executive roles.** 82% of Fellows have reached this career level one year after the conclusion of the Fellowship.
- Fellows move into **new organizations where they report more influence** in the Jewish sector. 30% of all Fellows moved to a new organization with increased influence.
- Fellows **remain very committed to future lay leadership** in the sector, but **commitment to a professional role in the sector decreases** a year after the end of the Fellowship, likely due to Fellows’ increased view of their potential and professional opportunities.
- Fellows attribute the Fellowship to an increase in many leadership skills, such as **confidence and attention to self-care**.
- 2/3 of Fellows report their Fellow and Senior Fellows experiences have **contributed substantially to positive change in their organization**.
- 7 out of 10 Senior Fellows have **collaborated meaningfully with another Fellow** a year after the end of the Fellowship.
- Half of Senior Fellows say they have **increased their influence in the Jewish sector** a year after the end of the Fellowship. Increased influence may look like a more senior role in their current organization, moving to a new organization that they feel is more influential in the sector, or increasing their influence through a lay leadership role.
- Fellows increase their involvement with lay role and lay leadership. 6 out of 10 Fellows are **invited to participate in a lay role** either during or after the Fellowship, and **37% of all Fellows hold Board leadership roles**.

**Conclusion**

I truly felt like I mattered as a part of this Fellowship and that **I belonged**. Thank you for making me feel that my contributions were important. **Everyone wants to feel connected, and this Fellowship did an incredible job at doing that for me.**

– Fellow

I used to think that I would have to become a new person to truly be a leader - with new personality traits, and new approaches to leadership. **I didn’t realize there was power or efficacy in leading as my authentic self, and now, I do** - which has made me more genuine, and has boosted my confidence and the ease with which I approach leadership (all the while noting that it’s not always easy!).

– Senior Fellow
1. **Fellowship Programming: Reimagine OCI/CI**

The Schusterman Family Foundation has revised and adapted the concept of the OCI/CI since the beginning of the Fellowship based on feedback from Fellows. However, feedback on this component remains mixed. Fellows remain unclear about how they are supposed to develop their OCI/CI, what support they can/should receive from other Fellows, and what the ideal timeframe is for completion. This speaks to a lack of clarity about the ultimate purpose of OCI/CI and how it is intended to enhance Fellows’ experience and learning. In order to ensure that the OCI/CI is as enriching a component as the rest of the Fellowship program, a clear goal for the OCI/CI must be determined – is it primarily an opportunity for Fellows to put new skills into practice? Is it intended to be a vehicle for organizational change? Better articulating the purpose of the OCI/CI will help Schusterman to reimagine the strategy for the OCI/CI and its ideal implementation. Fellows have suggested creating a peer review process for the OCI/CI, small groups of Fellows to serve as accountability partners, or making the experience optional. If a goal and structure do not crystalize for Schusterman, the OCI/CI component could be eliminated, however a small number of Fellows (approximately 4-5 per cohort) report meaningful organizational change and personal leadership development through the OCI/CI. If this component is removed, it would eliminate the potential for those changes.

2. **Senior Fellow Strategy: Incorporate the Senior Fellow Programming and Fellow Network into the Theory of Change**

The Senior Fellows program and Fellows network initially formed organically as the Fellowship program evolved. Because of this, neither component benefited from an upfront strategic development process. While the Foundation has developed a set of goals for each component, the goals for the Senior Fellows program and Fellow network have not aligned with the current programming in a way that optimizes either. By incorporating both the Senior Fellows program and the Fellow network into the Fellowship Theory of Change, Schusterman can communicate those goals to the Fellows and Senior Fellows, consider how to create strategies that will support those goals, and ensure maximum alignment with the core Fellowship program.

3. **Senior Fellow Programming: Provide more infrastructure to support Senior Fellow programming if the Foundation intends for the Senior Fellows to form a well-networked community**

Currently the Senior Fellows programming maintains a loose network of Fellows, offers learning opportunities to those who can make the time to attend, and provides targeted support to a smaller group of individuals with the motivation to apply for funds or stay closely connected to the Foundation. However, many Senior Fellows are so busy with their personal and professional lives that they cannot make time on an ongoing basis to remain closely involved with their cohort or develop new relationships with members of other cohorts. If Schusterman has more ambitious goals for the Senior Fellow programming to impact Fellows in a deeper way, it will need to provide more infrastructure and support to the Senior Fellow programming. The Fellows and Senior Fellows have provided specific suggestions of what this support could entail which are outlined on slide 22. Other specific strategies and implementation ideas would likely emerge from a theory of change process for the Senior Fellows program and Fellows network (see recommendation 2). Finally, Schusterman is embarking on a social network analysis process to gain insight into the strength of the Senior Fellows Network and these insights should be used to determine Senior Fellow and Senior Fellows Network programming.
Appendices

- Appendix A: Evaluation Purpose and Methods
- Appendix B: Data Citations
Appendix A: Evaluation Purpose and Methods

Data included in this report were collected through the following methods:

**Surveys**

**Fellow survey – Post-program**
Fellows completed an online survey that was launched approximately 6-months after the end of Fellowship programming. Year one Fellows had a 96% response rate (n=22), and years two and three both had 100% response rates (n=29 and n=30, respectively).

**Senior Fellow survey – 1-year post-program**
Senior Fellows completed an online survey about their experiences as Fellows and as alumni approximately 12-months after the completing the Fellowship. The Senior Fellow survey had a 100% response rate (n=53). The demographic composition of Fellows and Senior Fellows is shown below. Information on sector employment was not collected from year one or two Fellows post-Fellowship, but one-year post-Fellowship in the Senior Fellow Survey.

Select survey results are incorporated throughout this report.

**Interviews**

**Fellows and Senior Fellows**
LFA conducted one-on-one phone interviews with 49 Fellows approximately 6 months after the end of the Fellowship. LFA also conducted one-on-one phone interviews with 14 Senior Fellows approximately one-year after the end of their Fellowship experience.

**Supervisors of Fellows**
LFA conducted one-on-one phone interviews with supervisors of 29 Fellows approximately 6 months after the end of the Fellowship.

LFA compiled and analyzed notes from all of the interviews in order to identify key themes and trends.

### Demographic Composition of Survey Respondents

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<th>Senior Fellows</th>
<th>Women</th>
<th>Men</th>
<th>Non-Binary</th>
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<th>Other international</th>
<th>US-based</th>
<th>Jewish/Israeli sector*,**</th>
<th>Secular Nonprofit*,**</th>
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<td>57</td>
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*In both Senior Fellows Cohorts 1 & 2, one respondent reported that they were not currently employed.  
**In both Senior Fellows Cohorts 1 & 2, one respondent did not answer this question.
Appendix B: Data Citations

As the evaluation has evolved over the past three years, LFA has adjusted its inquiry to refine the approach and to address emergent areas of interest. At this time, post-program data is available for Cohorts 1-3 Fellows, and from the first two cohorts of Senior Fellows one-year after the end of the Fellowship. As such, the data points and sample sizes throughout the report may vary as they reflect the data available. The data reflected by each data point has been explicitly identified throughout the report. The following includes a guide for the footnotes in this report, and what survey data each point includes.

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<td>Post-program Cohorts 1, 2, and 3</td>
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<td>3</td>
<td>Senior Fellow Cohorts 1 and 2</td>
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<td>Post-program Cohorts 2 and 3</td>
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<td>Post-program Cohort 2 with updated Senior Fellow data, post-program Cohort 3</td>
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<td>Post-program Cohorts 1, 2, and 3; excluding Fellows who did not answer the survey question</td>
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