

## **UpStart Bay Area – 2010-2011 Evaluation Work**

### **Innovation Retreat Evaluation**

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## Overview

This report provides an evaluation of the first UpStart Innovation Retreat held in Alamo, California in October 2010. Twelve professionals and one lay leader representing eight Bay Area Jewish communal organizations attended the retreat. On the whole, the group was comprised of seasoned professionals from established organizations.<sup>1</sup>

This evaluation seeks to qualify any shifts in participant knowledge, behaviors, and attitudes as a result of their participation in the retreat. Specifically, the evaluation answers the questions:

- How, if at all, was the Jewish content presented at the retreat influencing participants' work. (knowledge shift, behavioral shift).
- How effective was the retreat, if at all, to inspire participants to change something(s) about their work (attitudinal shift).
- How participants have used, or plan to use, skills and knowledge gained at the retreat to implement change/innovation in their work, if at all (behavioral shift).

The evaluation also provides additional findings that surfaced during the data collection process on the retreat's purpose, structure, and guest list as well as constructive feedback and suggestions from retreat participants.

## Methodology

Jennifer Mangel designed the evaluation in partnership with UpStart staff, Maya Bernstein and Toby Rubin, and with feedback and direction from evaluation expert Wendy Rosov.

Data was collected in two ways:

1. Participants provided **written feedback** during the **last session of the retreat**. This 60-minute session was designed to help participants reflect on their retreat experience and provide information to UpStart staff and the evaluator about immediate take-aways from the retreat. This session was introduced and facilitated by Maya Bernstein. Data cards were collected and compiled by UpStart staff. Please see Appendix A: *Innovation Retreat Evaluation and Reflection Exercise*
2. Participants provided **oral feedback** during a **30-minute follow up phone interview**. Interviews were conducted 5-12 weeks following the retreat. Participants did not review their written feedback from the retreat prior to the phone interview however, the evaluator used this feedback to shape follow up questions. Interviews were conducted by

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<sup>1</sup> Established organizations include: Berkeley Hillel, Bureau of Jewish Education, Camp Tawonga, JCCSF, Jewish Community Federation of the East Bay. Developing organizations include: Shalom Bayit, Progressive Jewish Alliance. One emerging organization participated: EcoJews. 3 professionals had less than 5 years of experience, and 3 had 5-10 years of experience. 6 professionals have worked in the field of Jewish communal service for more than 10 years. The one lay leader who participated has served as a Jewish communal lay leader for fewer than 5 years.

Jennifer Mangel<sup>2</sup>. Please see Appendix B: *Innovation Retreat Follow Up Interview Protocol*.

Comments in quotation marks in this document are culled from the phone interview process. Efforts have been made to protect the identity of respondents whenever possible.

### **Summary of Findings**

Overall, participants were satisfied and positive about their experience at the first UpStart Innovation Retreat. Participants found great value in having an opportunity to leave the office and spend two days thinking critically about their work with colleagues from their own and other agencies. They generally found the structure and content of the retreat to be productive and useful.

*How, if at all, was the Jewish content presented at the retreat influencing participants' work. (knowledge shift, behavioral shift).*

The majority of the group (10/13) had a positive response to the content of the Jewish learning sessions and often described how they provided a framework to understand innovation and change within Jewish communal organizations. For some participants the content presented was new and for others it was not. Slightly more than half of the participants (7/13) found the experience of Talmud study to be interesting and engaging but not a technique they have brought back to their organizations<sup>3</sup>.

*How effective was the retreat, if at all, to inspire participants to change something(s) about their work (attitudinal shift).*

This was the retreat's strength, especially for professionals from established organizations. Through the workshops and exercises as well as through informal conversations retreat participants developed a sense that change is possible for their organizations.

*How participants have used, or plan to use, skills and knowledge gained at the retreat to implement change/innovation in their work, if at all (behavioral shift).*

Most respondents reported that they have not applied the knowledge and skills gained at the retreat to their work. However, many respondents (8/13) indicated an interest or action towards using inquiry-based research for program planning. An equal number of respondents (some overlap of individuals<sup>4</sup>) indicated an interest in offering staff development programs that would reflect the content of the Innovation Retreat (Jewish learning and/or Design Thinking). Respondents universally agreed that it would have been of greater value to have more of their colleagues (professionals and lay leaders) present at the retreat to spread the wealth of knowledge more broadly and deeply through their organizations.

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<sup>2</sup> At the request of a retreat participant, one interview was conducted by Gale Mondry, UpStart's Vice-President, Development and Operations.

<sup>3</sup> Five respondents cited time obstacles to applying Jewish learning; five respondents indicated that the style does not apply to their work and/or the population they serve.

<sup>4</sup> 10/13 participants indicated an interest in using inquiry based interviews and/or creating staff development programs.

## Findings

### *Jewish Content – Knowledge Shifts*

Most respondents had favorable responses to the content of the text studies and presentations by Rabbi Benay Lappe. They enjoyed her teaching style and found the content itself an engaging and useful frame for thinking about their work. Several respondents specifically noted that the notion of change and innovation being rooted in Jewish tradition was new to them and it was a welcome idea. Notable respondent comments include:

“The content was interesting...I think it was a new conversation for me and for most people.”

“This is a personal thing – relating the notion of innovation all the way back to Talmud and text resonated with me. I’m not a particularly religious person but I found it to be enlightening. Here we were trying to forward think but spent the beginning of each session thinking back.”

The text study connected “the whole thing with our tradition in form and content.”

“The part that sticks with me is that our story is crashing and that supposition is in the Talmud. The stories about the destruction of the temple are a way of dealing with the notion that our story is crashing.” The respondent also noted that the Jewish learning offered an “intersection between paradigm busting and spiritual teaching” and that Rabbi Lappe offered “very out there interpretive strategies that are in the Talmud that I didn’t know about.”

“Benay was able to put herself in it and stay straightforward, sincere, without an agenda. She was the real deal – what was coming out of her mouth, she felt.”

“It has to do with the way she teaches – less with the content. She makes [the text] stand on its head – she made me pay attention to the text.”

A minority of respondents found the emphasis on text study to detract from the larger purpose of the retreat and did not find value in the Jewish learning (style and/or content):

Respondent did not feel the text study was linked to clear action and “didn’t get if it was supposed to be a tool.”

“I don’t particularly enjoy sitting around studying Talmud and looking for a tie in to the bigger idea.”

Respondent felt Rabbi Lappe’s style did not leave room for conversation and exploration of ideas to evolve.

“Part of the challenge of Jewish innovation is that we too often try to rely on a Jewish model instead of looking at modern models.” This respondent continued by suggesting that much could be learned from looking at a business that was about to fail and how it held itself together through change then concluded that the work is, “not only about Jewish ethics and values. Its also about business.”

### *Jewish Content – Behavioral Shifts*

Some of the more senior professionals and/or professionals with more extensive levels of Jewish education and experience did not find that the Jewish learning at the retreat offered any new content or technique for their work:

“Nope, I loved [the style of Jewish text study] because it’s what I do already.”

Several professionals indicated that they liked the content and methodology of the Jewish learning and have not been able to apply it to their work due to time/resource constraints or their level of comfort teaching this type of material:

“I’m the sort of person who might go back and read my notes but I haven’t done that.”

“Text is a weak area for me – I wouldn’t go to that as something I would lead.”

“In hindsight, I could have used that material for our Hanukah appeal but I just didn’t remember it.”

Respondent needs to “decide what is really worth people’s time. It is one of about twenty-hundred things to make time for.”

Some respondents noted that the technique and/or content is not appropriate for them to replicate with their population:

Rabbi Lappe “used a literal translation strategy...it’s probably not useful for [my client group] but was interesting [for me].”

The “nature of the conversation was geared towards professionals in the room [who had extensive experience with Jewish learning] and that “some of us were not Jewishly literate to the level in the room” and were therefore unable to engage fully in the conversation. The respondent noted that trying to use this level of Jewish learning in a similar exercise for professionals or lay leaders in the community would be problematic because, in most cases, the knowledge gap would be even greater in the larger population.

When people did think about utilizing the same or similar approach to Jewish learning in the retreat it was in reference to developing or redeveloping staff enrichment programs:

The retreat “reinforced the potential role of text study in staff development.”

Respondent left inspired to “educate young educators” about the difference between following law and following intuition.

“I’ve thought about teaching that particular text for the staff – it would apply to everyone. The additional text resource was valuable.”

*Retreat as Inspiration for Changing Work – Attitudinal shift*

All retreat participants reported value in having time to step out of the office for a chance to think about their work. Many respondents were clear about the benefit of this time on their thinking about their work and noted that the content and structure of the retreat provided a necessary framework in which to do the creative thinking:

“Our organization has been around [for a long time] – some things seem holy or untouchable. This framing of change made me more comfortable with questioning things and being open to making changes this year.”

The retreat “pushed me to think about places [where our staff has] gotten lazy” and to “see the areas that are not as strong” so that they can start to rethink the topics that will be interesting to people.

The retreat didn’t shift this respondent’s thinking but “sharpened it” and provided encouragement to “think beyond what exists” as well as “recognition that there is still room for innovation in established organizations.”

The retreat “didn’t change my style but reinforced it” and was a reminder to “constantly take advantage that my customers are here every single minute of the day. [We need to] make sure that what we offer is what they want.”

“When you work in an established organization turning the boat takes so much energy – having the chance to talk with other [professionals from similar organizations] helped me realize that it doesn’t take as much energy as we think it should be.”

“Just talking with people about how they run their organization, how they got started, anything that will help me get our organization better structured is of value.”

A minority of retreat participants articulated negative experiences in the Jewish Innovation Landscape session and the Innovation Lab sessions:

Shawn’s presentation style had a sense of “I’m-on-the-cusp-of-it-and-you’re-not” and did not foster inclusivity.

“The fly in fly out thing didn’t work.”

Shawn was not “intimately informed of the environment he was speaking” e.g., used incorrect numbers when talking about rates of affiliation in the Bay Area Jewish community.

“The innovation lab didn’t work for me. I felt bombarded with information and pushed to fit myself into it.”

Toby was “militantly focused on process and procedure” and instructions were unclear.

### *Design Thinking – Behavioral Shifts*

Most retreat participants found the focus on interviewing clients to be of great value – several noted that this learning reinforced and/or refined work they already do:

“This is kind of what I do anyway – [the retreat] highlighted that I need to do it sooner in one of my projects.”

“We were already doing a lot of the things that the facilitators were talking about.” Respondent later made specific reference to outcomes based planning.

Respondent was working on a new initiative prior to the retreat and had “lots of informal conversations already, but now are going back to them in a formal way.”

“Being able to practice [new skills at the retreat] allows you to be able to translate the skills back to work.”

Respondent was working on a SWOT analysis prior to the retreat but upon return trained staff to use the inquiry model taught at the retreat so that, “rather than speaking directly about program offerings and needs [agency staff] spent a lot more time trying to understand who [our target audience is] and through that conversation we were able to hone in on what their lifestyle patterns and needs are.”

Some participants felt the retreat provided a good framework for discussion and/or reflection but did not translate into actionable items:

“It hasn’t turned into action – I’ve been in a period of time of extreme overload. More than the usual level of non-profit madness.”

“The retreat should have been an opportunity for organizations to learn from each other and figure out how they could work together and learn from each other but I didn’t come out of the retreat with any of those things being implemented.”

“Unhinged brainstorming is good but at some point it needs to be honed in and focused on something that could actually work.

The retreat was “good as a thought exercise but did not sufficiently address resource management to realize those ideas.”

### *Retreat Purpose, Structure, and Guest List*

Respondents who had an agency colleague present reported that working in a team from their agency was of value. Similarly, respondents who attended the retreat alone reported that they saw the value to organizations with more than one person present and think they would have found increased value in experiencing the retreat with a team. When asked if they would have created and facilitated a similar retreat for their staff or board, respondents uniformly said “No.” When asked if a similar retreat could be useful as a staff/board training exercise respondents were positive about the idea but reluctant to do so because of the high investment of resources it would require. Two retreat participants were new to the San Francisco Bay Area and reported that the retreat was of particular value in helping them understand the Jewish communal map in this community.

“It was stimulating to be with the other Jewish organizations and see how they applied the concepts.”

The Jewish community “needs more opportunity for facilitated, informal gathering of thinking – it doesn’t even need to be innovation – just creating a space for think-tanking.”

The respondent felt “engaged” in the entire retreat and noted that this is “partly to do with the [small] size of the group. If it was much bigger the format might have been more difficult.”

It would have been beneficial to have other staff members present “because we’re so small we all have a different focus... different ideas might have been generated.”

“I’d like to think that we could have done this work on our own, but the structure of the retreat with planned activities was helpful. Self starting can be hard.”

In general, respondents had positive comments about the retreat pace and structure. The Jewish learning sessions and the Innovation Lab session which focused on interviewing clients were reported as most valuable by respondents. The session titled “Finding your place in the Jewish innovation landscape” was the session respondents reported as having little value. Respondents uniformly appreciated the chance to learn with and from their colleagues and found that many of their best conversations happened outside of formal sessions:

“Often these retreats are very frontal. [This retreat] had a good combination of discussion and practice.”

[Regarding session titled From Values to Vision] “The advertised session didn’t match the actual session.”

“The retreat had us in a semi-passive role” and the group did not generate energy or bounce ideas off each other. The respondent observed that there was not structured time for relationship building between participants yet this happened “on the side.”

### *Additional Feedback and Suggestions*

Retreat participants made the following recommendations in their follow up interviews:

- Consider strategic marketing and invitations to the retreat.
  - Ideally, “a retreat like that would be made up of 170 partners – senior professionals, rabbis, all types of organizations.” And if you couldn’t get 170 people in the room, “any random sampling of that group would be great.”
  - “A similar retreat could work for lay leaders – especially if it focused on mission, governance, and how they could be obstacles to innovation.”
- Consider audience specific retreats.
  - For specific agencies as staff/board trainings.
  - For specific types of agencies, e.g., only established organizations.
  - Consider a retreat that draws “a broader scope of organizations” and not limited to Jewish organizations, “If we want to help Jewish organizations, expose them to everything.” E.g., if JVS was participating in the retreat UpStart might also invite Compass Point.
- Jewish Learning
  - Offer a service in which retreat participants could receive help to identify text or other materials to use when facilitating Jewish learning.
- Relationship Building
  - “There was some social time but there was such a high value put on being crisp and delivering content that there wasn’t a lot of open space for immersion into ideas. Even having a loosely structured half an hour once a day [for free form thinking and conversation] would have gone a long way to foster ideas and relationships between participants.”
  - A few respondents noted they would have liked to do the planned art/personal sharing exercise that had been planned.
- Continuation of the Work
  - Consider a series of follow up meetings in the city following the retreat.
  - Consider one-on-one work with UpStart staff following the retreat.
  - Considering developing a retreat curriculum that participants could use to run a similar retreat for their agency staff.
- Evaluation
  - At the end of the first day include a chance for participants to comment on “strengths and improvables” so that the staff could make changes to the second day. This “would have given people more permission to share their thoughts and would also model for how to do this in their own work.”
  - Please share evaluation with retreat participants.
  - Surprise that the end of retreat evaluation did not include an opportunity to comment on logistics, workshop/session leaders, etc. The phone call was helpful as a way to offer that information.

### **Appendices**

- A. Innovation Retreat Evaluation and Reflection Exercise
- B. Innovation Retreat Follow Up Questions

*Appendix A: Innovation Retreat Evaluation and Reflection Exercise*

UpStart Innovation Retreat October 2010 / Cheshvan 5771  
Where do we go from here? Evaluation & Reflection

60 minutes

In this retreat session participants will:

1. Reflect on and articulate their level of learning and satisfaction at the UpStart Innovation Retreat including:
  - a. Jewish learning
  - b. Innovation learning
  - c. Retreat at large
2. Articulate a timeline for their organization's post-retreat work
3. Articulate dates for UpStart follow up with the organization including:
  - a. Maya to follow up on their post-retreat work
  - b. Jenni to conduct six month interview/focus group

Introduction and Explanation of Exercise (10 min)

Facilitator introduces the exercise including the following points:

- This session is designed for your reflection on your experience at the retreat and as a way for UpStart staff to gather important information for our own learning and enhancing our work with organizations like yours
- We have designed this session to be interactive and model an innovative approach to gathering participant feedback
- Here's how it will work:
  - Several questions are set up around the room that address four aspects of our time together: Jewish learning, Innovation learning, Big Picture elements of the work, and your general experience at the retreat.
  - You will spend approximately 20 minutes moving around the room to answer the posted questions. We would like you to write your answers on the index cards provided with each question. *Jenni suggests, if possible, have different colored index cards for each question or mark the index card to indicate what question it answers.*
  - When everyone has had a chance to answer the questions we will come together as a large group to discuss your responses. We will be collecting the index cards at the end of the exercise – please write legibly and in full enough thoughts that someone will be able to read and understand your written answers. Please write your name on each card if you are willing – this will help us to better understand each individual's answers. *Jenni suggests asking them to write their names on the cards so we can go back to them for follow up. Because of the small size of the group we are likely to be able to guess who writes what anyway, so we can remove any sense of anonymity from the get go.*
  - The reflection is designed in this way to maximize your individual and collective reflective experience.

- Facilitator will provide a time check every 5 minutes during the initial writing to help you manage your time and answer all the questions.
- We'll spend the last 15 minutes of this session working in organizational teams on timelines for the next several months and will explain that process when we come to it.

### Reflection (35 min)

Stations should be located around the room in such a way that participants will be able to write and converse comfortably. Questions should be posted on walls or table tents – something that allows a visual focus for the participants during the reflection and discussion phases.

#### Questions:

##### *Jewish learning*

1. Please describe a moment, if any, during the retreat in which you felt Jewishly inspired or nourished.
2. Which, if any, of the Jewish texts, traditions, or ideas to which you were (re)introduced at the retreat will you use in your work/take back with you? In what ways might you use them?

##### *Innovation learning*

3. Please describe a moment during the retreat, if any, in which you felt inspired to create an innovative solution to a challenge you are facing at work.
4. Which, if any, aspects of “Design Thinking” are you interested in using in your work? In what ways might you use them?

##### *Big picture*

5. How, if at all, do you see your organization contributing to the Jewish innovation ecosystem?
6. How, if at all, do you see yourself contributing to the Jewish innovation ecosystem?
7. How, if at all, has your attitude about the above two questions shifted as a result of the retreat?

##### *General experience*

8. Please state three things you expected to happen during the retreat. Did the retreat meet these expectations? If yes, how? If not, what was missing?

8. Timeline and Calendaring (10 min)

Facilitator will explain that as part of the retreat each organization will have two types of follow up meetings:

- With Maya for checking in on how post retreat work is going
- With Jenni Mangel who is doing an evaluation of the retreat to assess 6 month progress

Each organization will sit on their own to:

1. Review timeline created in Innovation Lab II
2. Please identify a two-week window of time you would like to have Maya contact you for a follow up consult on your post-retreat work.
3. Please sign up for a 6 month interview with Jenni
  - a. Organizational teams will be interviewed on the same day (TBD if will be individual or group interviews – will probably depend on the organization)
  - b. Individual interviews will last approximately 60 min; group interviews will be approximately 90 minutes and may require some follow up questions with individuals
  - c. Location of interview will be determined at a later date – will either be by phone or at your place of business and will depend on how the interview schedule looks and if Jenni can get to you.

Date / Time	Organization	Contact Person	Notes
Tues April 5 / 10am – noon			
Tues April 5 / Noon – 2pm			
Wed April 6 / 1pm – 3pm			
Thurs April 7 / 11:30am – 2:30 pm			
Tues April 12 / 10am – noon			
Tues April 12 / Noon – 2pm			
Wed April 13 / 1pm – 3pm			
Thurs April 14 / 11:30am – 2:30 pm			
<i>Note: first night of Passover is Monday, April 18<sup>th</sup>.</i>			
Thurs April 28 / 11:30am – 2:30 pm			
Tues May 3 / 10am – noon			
Tues May 3 / Noon – 2pm			
Wed May 4 / 1pm – 3pm			
Thurs May 5 / 11:30am – 2:30 pm			

Closing (5 min)

Facilitator asks group to stand in a circle then asks each person to pick an adjective that describes how they are feeling leaving the retreat. Each person shares her or his adjective with the group out loud traveling in a circle (or “popcorn”) around the group.

*Appendix B: Innovation Retreat Follow Up Interview Protocol*

UpStart wants to know:

- How effective was the retreat, if at all, to inspire participants to change something(s) about their work (attitudinal shift).
- How participants have used, or plan to use, skills and knowledge gained at the retreat to implement change/innovation in their work, if at all (behavioral shift).

JJF wants to know:

- How, if at all, was the Jewish content presented at the retreat influencing their work (knowledge shift, behavioral shift).

Opening the call:

Thank you for taking a bit of time to speak with me about your experience with the UpStart Innovation Retreat. I hope you will feel comfortable to speak candidly about your experiences. I will be reporting findings from these interviews to UpStart staff and will make efforts to mask individual identities when possible, though given the small size of the group this may not always work.

I have a few questions about your experience at the retreat and then a few about time since the retreat. I expect our call should last about 30 minutes. I'll be taking notes as we talk. Do you have any questions for me before we begin?

Demographic Questions:

1. Confirm title/role at agency
2. Confirm if colleagues were present at retreat
3. Confirm if participant was present at full retreat
4. Confirm number of years participant has worked in Jewish communal service

About the retreat:

1. Knowing that hindsight is 20/20, I'm curious to know which parts of the retreat, if any, stand out as particularly valuable to you.
2. Are there any that stand out to you as less valuable?
3. I have a few questions for you based on the feedback you provided at the end of the retreat. [individualized questions based on retreat feedback]

Since the retreat:

1. [If colleagues were present at the retreat] Since you've returned from the retreat, have you discussed content or ideas from the retreat with others who were there?
  - a. If so, in what context? What did you discuss?
2. Since returning from the retreat, have you shared anything you learned with co-workers or lay leaders who were not at the retreat?
  - a. If so, what? How was it received?
3. Has your thinking about your work changed as a result of the retreat?
  - a. If so, in what ways?

Possible follow up questions to work into main questions depending on responses:

*Jewish Learning*

- What made Rabbi Lappe’s teaching effective/ineffective?
- What made the content presented by Rabbi Lappe engaging/not engaging?
- [If negative response to Jewish content] What type of Jewish learning (content and style) would have been more appropriate?

*Design Thinking*

- Can you provide me with some examples of how you might use the skills you learned?
- What obstacles are preventing you from using the skills you learned?
- In what ways was the information presented similar to how you already work?

*General Retreat*

- What is the ideal target audience for a retreat like this?
- Could your organization have done the learning you did at the retreat on your own by planning a day out of the office?
- Would it be useful to your organization to have additional staff/lay people trained in this way? If yes, please explain.
- Is there any additional feedback you would like me to provide to UpStart staff about your retreat experience?

Format to track responses:

Participant Name	Colleagues Present at Retreat: Yes No
Participant Organization	Participant was present for full retreat: Yes No
Participant Title	Years in the field: >5    5-10    10<

**Attitude Shifts**

Retreat **inspired** me to **think differently** about my work.

I am **thinking differently about Jewish content** in my work as a result of the retreat.

**Behavioral Shifts**

I have **used Jewish skills/knowledge gained** at the retreat.

I have **used Design Thinking skills/knowledge gained** at the retreat.

**Additional Comments**

Date of Interview:	Weeks Since Retreat:
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