

# Independent Evaluation of the **Jim Joseph Foundation's Education Initiative**

## Executive Summary



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# Executive Summary

The Jim Joseph Foundation created the Education Initiative to increase the number of educators and educational leaders who are prepared to design and implement high-quality Jewish education programs. The Jim Joseph Foundation granted \$45 million to three premier Jewish higher education institutions (each institution received \$15 million) and challenged them to plan and implement programs that used new content and teaching approaches to increase the number of highly qualified Jewish educators serving the field. The three grantees were Hebrew Union College–Jewish Institute of Religion (HUC-JIR), the Jewish Theological Seminary (JTS), and Yeshiva University (YU). The grant covered program operation costs as well as other costs associated with institutional capacity building. The majority of the funds (75 percent) targeted program planning and operation. The grantees designed and piloted six new master’s degree and doctoral degree programs or concentrations;<sup>1</sup> eight new certificate, leadership, and professional development programs;<sup>2</sup> two new induction programs;<sup>3</sup> and four new seminars within the degree programs.<sup>4</sup> The Education Initiative also supported financial assistance for students in eight other advanced degree programs.<sup>5</sup> The grantees piloted innovative teaching models and expanded their use of educational technology in the degree and professional development programs.

According to the theory of change that drives the Jim Joseph Foundation’s Education Initiative, five types of activities must take place if higher education institutions are to successfully enhance the Jewish education workforce. These activities include (1) improved marketing and recruitment of talented individuals into ongoing education programs, (2) a richer menu of programs requiring different commitments of time to complete and offering varying content, (3) induction programs to support program participants’ transition to new employment settings, (4) well-planned and comprehensive strategies for financial sustainability, and (5) interinstitutional collaboration.

As shown in Exhibit 1, the five types of activities are divided into two primary categories. The first category (boxes outlined in green) addresses the delivery of programs that provide educators and educational leaders with research-based and theory-based knowledge and vetted instructional tools. The second category (boxes outlined in orange) is not programmatic; rather, it involves sharing

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<sup>1</sup> The new degree programs are as follows: the executive master’s degree (HUC-JIR), the accelerated master’s degree (YU), the school partnerships master’s degree (YU), the online master’s degree (YU), the enhanced master’s degree in Jewish education (which includes the Experiential Learning Initiative; JTS), and the executive doctoral degree (JTS).

<sup>2</sup> The new professional development programs are as follows: the Certificate in Jewish Education for Adolescents and Emerging Adults (HUC-JIR), the Jewish Early Childhood Education Leadership Institute (HUC-JIR and JTS), the Jewish Experiential Leadership Institute (JTS), the Certificate in Differentiated Instruction (YU), the Certificate in Educational Technology (YU), the Certificate in Online/Blended Instruction and Design (YU), the Certificate in Experiential Jewish Education (YU), and the Online Professional Development Modules (YU).

<sup>3</sup> The new induction programs are as follows: the Induction and Retention Initiative (HUC-JIR) and the New Teacher Induction (YU).

<sup>4</sup> The seminar programs are as follows: Visions and Voices (a 10-day Israel seminar [reinstated]; JTS), the Keshet Hadash semester in Israel program (JTS), the Innovators Circle (YU), and Experiential Learning Missions (YU).

<sup>5</sup> The following degree programs also provided financial support for students: the master’s degree in Jewish education (HUC-JIR), the master’s degree in religious education (HUC-JIR), the joint master’s degree: Jewish education and Jewish nonprofit management (HUC-JIR), the master’s degree in Jewish education for rabbinical and cantorial students (HUC-JIR), the doctorate (EdD) in Jewish education (JTS), the BA/MA program (YU), the traditional part-time Azrieli master’s degree (YU), and the master’s degree in biblical and Talmudic interpretation (YU).

knowledge, building staff capabilities, enhancing management structures, and providing technological and financial support to enable the development of quality programming that is sustainable after the grant ends.

**Exhibit 1. The Theory of Change for the Education Initiative**

	GOALS	RESOURCES	ACTIVITIES	OUTCOMES
<b>PROGRAM LEVEL</b>	1. Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs and earn advanced degrees and education credentials.	<ul style="list-style-type: none"> <li>Financial assistance</li> <li>Enrollment management technical assistance</li> <li>Recruitment specialists</li> <li>Funding for new programs (e.g., online learning)</li> </ul>	<ul style="list-style-type: none"> <li>Improve marketing and enrollment management practices.</li> <li>Eliminate obstacles to participation.</li> </ul>	<ul style="list-style-type: none"> <li>Increased numbers of participants</li> <li>Increased diversity of participants</li> </ul>
	2. Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.	<ul style="list-style-type: none"> <li>Instructional and administrative personnel</li> <li>Mentors</li> <li>Technology specialists</li> <li>Content advisors</li> </ul>	<ul style="list-style-type: none"> <li>Offer choice of program content, schedule, format, and duration.</li> <li>Support translation of theory into practice.</li> </ul>	<ul style="list-style-type: none"> <li>Improved professional knowledge</li> <li>Improved practice</li> <li>Higher career aspirations</li> </ul>
	3. Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.	<ul style="list-style-type: none"> <li>Instructional and administrative personnel</li> <li>Mentors</li> <li>Alumni engagement coordinators</li> </ul>	<ul style="list-style-type: none"> <li>Induction programs</li> <li>Follow-up professional development</li> <li>Alumni network</li> </ul>	<ul style="list-style-type: none"> <li>Increased job retention and promotion rates</li> <li>Increased numbers of emerging leaders</li> </ul>
<b>INSTITUTION LEVEL</b>	4. Develop the infrastructure that will sustain new programs.	<ul style="list-style-type: none"> <li>Faculty professional development</li> <li>Asynchronous and collaborative online learning environment</li> <li>Financial sustainability planning tools and processes</li> </ul>	<ul style="list-style-type: none"> <li>Identify and implement staffing, marketing, fundraising, and management practices that are needed for program sustainability.</li> </ul>	<ul style="list-style-type: none"> <li>Improved processes for financial sustainability</li> <li>Improved infrastructure for developing, implementing, and scaling up programs</li> </ul>
	5. Identify areas of programmatic and interinstitutional collaboration for improving program quality.	<ul style="list-style-type: none"> <li>Knowledge sharing platforms and networks</li> <li>Funding for joint programs</li> <li>Interinstitutional activities coordinator</li> </ul>	<ul style="list-style-type: none"> <li>Combine resources across institutions to improve faculty knowledge and skills, program quality, and alumni services.</li> </ul>	<ul style="list-style-type: none"> <li>Increased numbers of joint programs and initiatives</li> <li>Improved culture of collaboration</li> </ul>



## EVALUATION METHODOLOGY

American Institutes for Research (AIR) conducted an independent evaluation of the Education Initiative. The evaluation addressed five research questions that are aligned with the five goals of the initiative:

1. In what ways has the Education Initiative expanded the Jewish education pipeline?
2. What did the new degree and professional development programs accomplish?
3. How has the Education Initiative affected the career advancement of the program participants?
4. What lessons were learned about the support systems, structures, and processes that promote institutional capacity and program financial sustainability?
5. To what extent has the Education Initiative promoted interinstitutional collaboration among the three grantees?

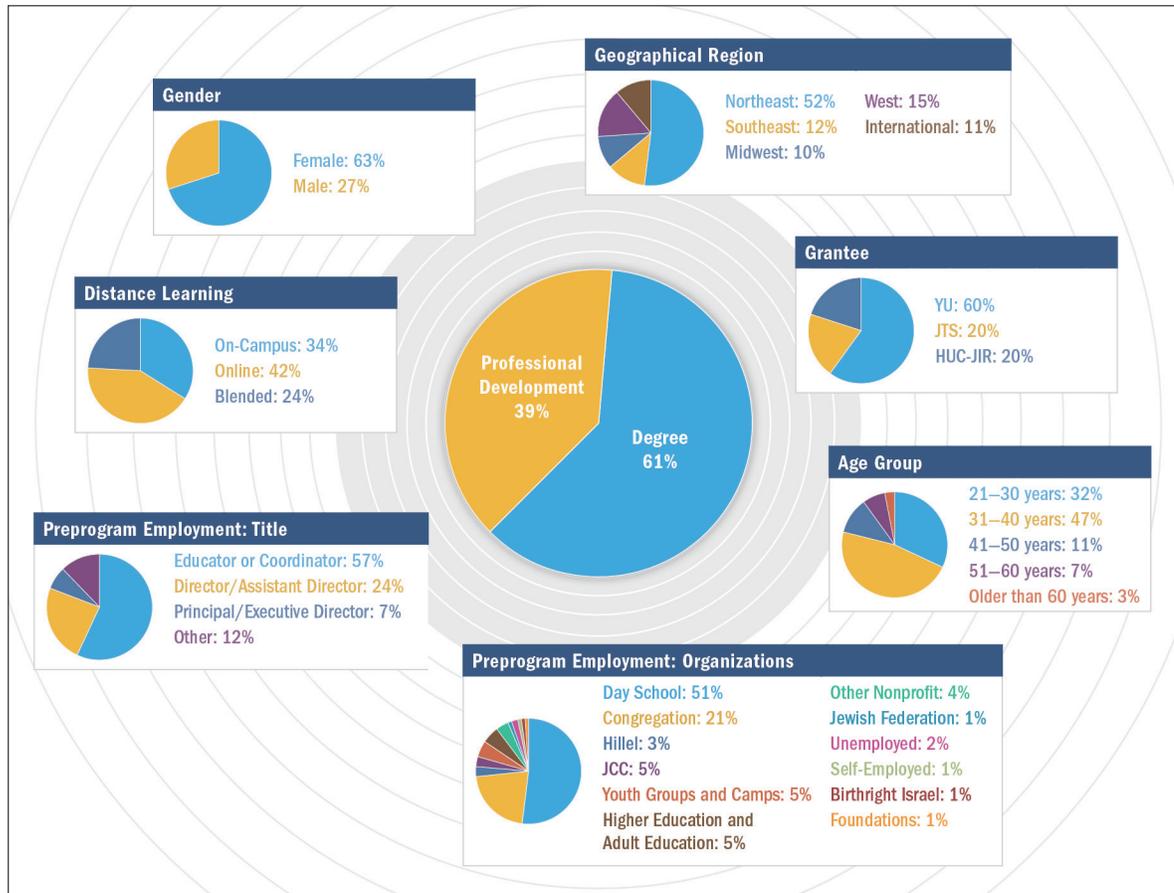
The study of the Education Initiative used multiple sources of data to gather information about participants' history, attitudes, professional learning and practice, and program satisfaction. AIR researchers administered online surveys to more than 800 program participants and alumni and conducted phone interviews with more than 200 alumni. In addition, the researchers interviewed more than 100 employers; conducted annual interviews with the presidents, deans, project directors, and coordinators at each grantee; and reviewed participants' records. The records contained, for example, each participant's preprogram state of residence; enrollment status; and employment prior to, during, and after graduation. Using publicly available records and alumni surveys, the study team gathered employment information one year after each participant graduated or completed a professional development program.

### GOAL 1

**Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs and earn advanced degrees and education credentials.**

**The Education Initiative reached a large number of professionals across the United States and internationally.** The majority of the new programs were designed and launched within two years of the start of the Education Initiative. Between 2010 and 2016, the grant supported 1,508 individuals across the entire spectrum of Jewish education settings (see Exhibit 2, which provides details on the characteristics of the participants at enrollment). Although most of these professionals reside in the United States (89 percent), the new online program offerings also attracted international students. Of the U.S. students, approximately one half lived in the Northeast.

## Exhibit 2. The Education Initiative at a Glance: The Demographics of New Enrollees



### The Education Initiative nearly doubled enrollment in advanced degree programs in Jewish education and provided access to professional development to additional hundreds of educators.

Instead of the projected number of 580 matriculating students, the advanced degree programs supported by the initiative enrolled 920 graduate students—a 59 percent increase. Many of these individuals work for organizations, such as Hillel, camps, and Jewish day schools that are supported by the Jim Joseph Foundation through other grants. The Education Initiative enabled the development of new professional development programs, which enrolled 588 individuals. Therefore, across the degree and nondegree programs, the Education Initiative impacted more than 900 individuals, who otherwise would not have acquired during this time frame the skills and credentials that are in high demand in Jewish education.

**The Education Initiative targeted both experienced and aspiring educational leaders.** About one half of the beneficiaries were teachers and administrators in Jewish day schools; one fifth were directors of education in congregations; and one in 10 were youth program directors in Jewish community centers, youth groups, or camps. More than one third of the program participants, who were equally divided between the degree and professional development programs, already serve in middle and senior management roles in Jewish education settings. An additional one third of the program participants aspired to be promoted to management and leadership positions.

**All of the new programs consistently met their annual enrollment goals.** The availability of more diverse program options and offers of financial assistance removed barriers to program participation and enabled the grantees to meet their enrollment goals. Alumni and friends of the grantee institutions played a key role in recruitment. Program participants reported that financial aid, program content that aligned with their learning goals, and schedule flexibility were important factors that influenced their decisions to enroll.



## Goal 2

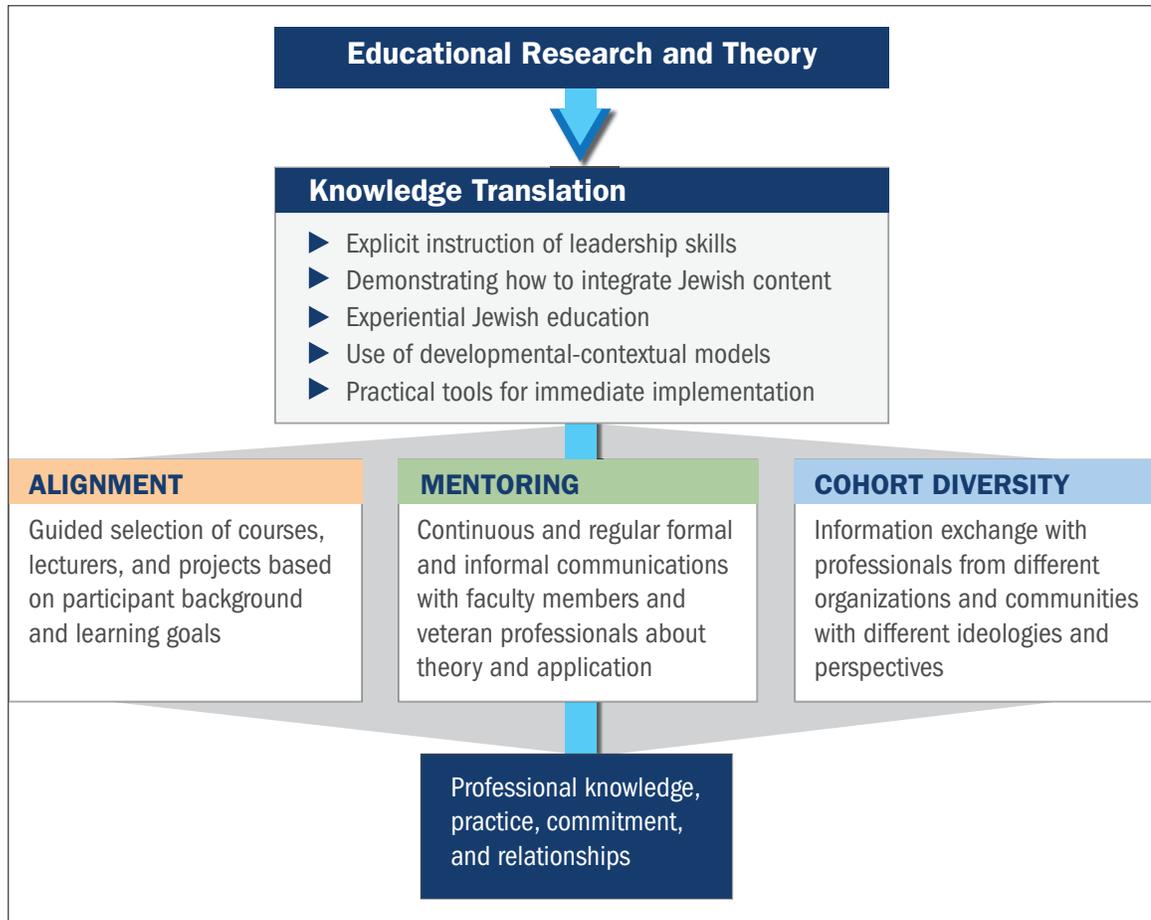
### **Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.**

**Most of the master's degree program participants were highly satisfied with the effects of their programs on their professional growth.** Nearly all the participants rated their programs as effective or very effective in providing the knowledge and skills they needed to be successful at their jobs (90 percent). According to self-reports from the participants, the five areas of greatest effects were as follows: knowledge of pedagogical practices in Jewish education (92 percent), ability to innovate (86 percent), professional networking (85 percent), leadership skills (83 percent), and knowledge about Judaism (75 percent). Because of their program participation, most of the participants (76 percent) introduced experiential Jewish education at their workplaces. In addition, more than 50 percent of the participants reported improved ability to develop or teach Israel education programs.

**Most of the professional development program participants felt that they were better educators and leaders because of their participation in the programs.** The professional development programs significantly impacted participants by infusing Jewish values into programs (75 percent) and introducing new instructional practices (73 percent). Employers noted the following impacts: participants had increased professional self-esteem (95 percent), were motivated to train fellow colleagues (90 percent), and introduced new instructional practices (83 percent).

**The program participants noted that particular aspects of their participation made them more effective.** Participant satisfaction was defined as overall ratings of program effectiveness in promoting the knowledge and skills that participants needed for their jobs plus participants' and employers' views on the program components and the conditions of the learning environment that made the programs uniquely effective. The framework for effective program design that emerged from these data is presented in Exhibit 3. According to this framework, the most unique aspect of the programs provided under the Education Initiative is anchoring practice in theory and research—a quality that the nationally recognized experts teaching the programs were uniquely positioned to do. The translation of theory into practice was supported by mentoring and building a cohort experience among professionals representing diverse educational settings. However, the participants noted that a third condition, which they valued and sought, was partially missing in most programs: the ability to construct an individualized learning plan that matched their educational backgrounds, professional experiences, and learning goals.

Exhibit 3. A Framework for Program Design



### Goal 3

**Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.**

**The Education Initiative contributed to a significant number of career advancements and job promotions.** Presently, almost one half of the master's degree program participants advanced their careers after participating in the various degree programs. Even after factoring in the costs that students incur when earning their degrees (e.g., lost income), the average return on investment of a master's degree in Jewish education was \$348,045, which represents a net income gain that averages \$12,000 per year.

**The benefits from obtaining a master's degree in Jewish education are moderated by the types of employment settings.** The highest lifetime earnings gains were estimated for professionals working in immersive Jewish experience environments, such as BBYO, the North American Federation of Temple Youth, the National Conference of Synagogue Youth, Birthright, camps, Jewish community centers, and innovative Jewish educational settings (\$457,981). Professionals who worked in congregations after program completion gained a relatively high return on investment in their education (\$383,283).

Professionals who work in Jewish day schools gained the least (\$183,061). The return on investment was similar for female and male professionals.

**The Education Initiative supported the advancement of professionals to educational leadership positions.** More advanced degree program participants (33 percent) than professional development program participants (9 percent) moved from nonmanagerial roles (e.g., teacher, coordinator, or counselor) to leadership positions (e.g., director or division head) after graduation. Among the advanced degree program participants, more female than male graduates transitioned to educational leadership positions.

**Induction programs supported both new professionals and their employers.** The employer interviews revealed that the mentoring provided by programs under the Education Initiative improved the performance of their new hires. Indirectly, because of the accelerated integration of new hires in the work environment, these programs enabled employers to pursue program improvement initiatives. Induction of new hires in director positions enabled senior management to better fulfill their own job responsibilities.



## Goal 4

### **Develop the infrastructure that will sustain new programs.**

**The Education Initiative enabled the grantees to improve their enrollment management strategies.**

With support from private consultants, acknowledged to be experts in higher education enrollment, the grantees made changes in their key marketing and enrollment management practices. The goal of these efforts was to recruit a large and diversified pool of prospective students. The grantees revamped their websites, replaced blanket policies of granting full tuition waivers with systematic processes for allocating financial assistance, and began building robust databases of prospective students. These efforts led to a dramatic increase in the number of inquiries.

**Financial sustainability depends on donors who can sponsor scholarships to eligible professionals.**

Although enrollment increases revenue through tuition and fees, the majority of program operation costs must be recovered through fundraising. For the Education Initiative, the grantees expanded or revised existing processes for reviewing costs and program revenues and examined alternative implementation plans to support long-term financial sustainability. According to the financial sustainability plans, revenue from tuition and fees can cover up to one third of the operation costs for most degree programs. This assumption was confirmed by analyzing the surveys completed by part-time and executive master's degree students across all three institutions. Analysis showed that most students were not willing or able to pay the current full tuition price, but they were willing to pay a reduced amount. Based on survey responses, the annual dollar amounts that part-time master's degree students were willing to pay ranged from \$5,250 to \$10,250, and the optimal price point was about \$7,500. In addition, approximately 40 percent of the graduate students reported that they would enroll immediately or in a few years without requesting financial aid assistance. Because tuition payments do not cover all the operating costs of programs, the grantees need to identify funding organizations (in addition to alumni) that can sponsor the remainder of the costs. In addition, the grantees believe that future funders are more likely to support financial assistance to program participants rather than program development and implementation costs.

**The Education Initiative sparked comprehensive improvements in educational technology, especially in faculty support systems.** All three grantees identified the necessary structures that can centrally support faculty members in designing and delivering online courses. Based on student feedback, the grantees concluded that blended instruction—such as supplementing online learning environments with in-person seminars—overcomes the limitations of online instruction. The grantees are willing to invest in sustaining and creating additional programs that include a blended learning model.



## Goal 5

### **Identify areas of programmatic and interinstitutional collaboration that can improve program quality.**

#### **The Education Initiative led to unprecedented collaboration among the three institutions.**

Four joint initiatives were launched under the Education Initiative:

- **eLearning Collaborative.** A set of shared professional development opportunities, including seminars and mini grants, to promote the use of educational technology and improve teaching practices in the classroom and online. A major component of the Collaborative was the eLearning Faculty Fellowship, a program delivered by the Columbia Center for New Media Teaching and Learning to two cohorts of faculty members.
- **Experiential Jewish Education Conceptual Work.** Efforts were instituted to professionalize practices, processes, and structures in the field of experiential Jewish education, with professionalization conceptualized as activities based on frameworks, theory, and research. By articulating the key principles of experiential Jewish education, the grantees sought to enable higher quality training programs and systematic activities, including research and the monitoring of practice quality. The grantees collaborated formally (e.g., conferences) and informally (e.g., observing each other's programs) to expand their understanding and articulation of the essential elements of experiential Jewish education.
- **The Experiential Jewish Education Network.** This network is a professional learning community that provides face-to-face sessions and online learning events to alumni of four programs developed under the Education Initiative. With the help of an independent coordinator and an alumni advisory group, the three grantees jointly planned and launched a network that offers continued education as well as platforms for knowledge sharing.
- **The Jewish Early Childhood Education Leadership Institute.** In collaboration with Bank Street College, JTS and HUC-JIR delivered a professional development program for new and aspiring early childhood education center directors. This unique program combined three fields: early childhood education, Jewish studies, and leadership development.

**Faculty members who supported intra-institutional collaboration also advocated interinstitutional collaboration.** The survey data showed that the tendency to collaborate is a disposition that predicts partnerships both within and outside the institution with which one is affiliated. Nearly two thirds (60 percent) of the faculty members surveyed reported a high level of collaboration, both personally and in terms of their school culture, relative to collaborating within one's institution and with other institutions.

**Effective interinstitutional collaboration depends on the compatibility of the organizational structures.** The greatest barriers to collaboration (by order of their importance) were differences in organizational size, processes, and structures. The grantees had different infrastructures and strategies for goal setting, management, and decision making. These differences limited the number of areas for effective interinstitutional collaboration. The grantees believe that differences in religious denominations are not among the key barriers to collaboration.

To fully engage all stakeholders, institutions should identify a common, compelling vision for interinstitutional collaboration. The grantees accomplished the goal of identifying areas for collaboration and testing the feasibility of collaborative programs. At the same time, the grantees acknowledged that the activities aimed to improve institutional capacity (e.g., joint staff development related to educational technology) have not successfully demonstrated that the “whole is greater than the sum of its parts.” This reality partly results from differences in organizational size, processes, and structures and a lack of clarity on the objectives and metrics for successful interinstitutional collaboration.

## CONCLUSIONS

**The \$45 million investment is a significant investment of Foundation funds, but investments of this magnitude are required to effect institutional change.** One of the most important changes the Foundation’s large-scale investment has supported is the development of nondegree programs that directly link work-based skills to the program curriculum. By introducing educational options that did not exist before and that are directly tied to workforce development, the Education Initiative has successfully met the demands of the Jewish education field for better trained educators and educational leaders and has improved the careers of many Jewish educators. The programs developed under the Education Initiative provide comprehensive support for learning, implementation, and refinement of new pedagogical and leadership practices of educators and leaders in formal and informal education settings. According to the participants and their employers, these programs have led to observable improvements in practice. Also, the program design and implementation experience validated assumptions about the program components that make educator and leader preparation programs effective.

**The broadest lesson arising from the independent evaluation of the Education Initiative is that well-designed investments in building new programs and institutional capacity for program delivery do work.** Evidence shows that such investments can increase the capacity of institutions with very different structures and target audiences to meet the professional learning needs of educators and educational leaders.

**In Jewish education, as in general education, the traditional and still dominant path to career advancement is higher education.** HUC-JIR, JTS, and YU demonstrated the capacity to implement programs that are rich in content, are delivered by nationally recognized experts, and include important supports such as mentoring. Input from the participants and their employers showed that the Education Initiative contributed to important professional learning and improved professional performance.

**In conclusion, educators and educational leaders benefitted from the programs supported by the Education Initiative.** These programs improved pedagogical and leadership practices and affected career pathways. Based on the evaluation results, AIR has several recommendations for further program development, which are presented in Exhibit 4.

**Exhibit 4. Recommendations for Future Activities**

GOALS	RECOMMENDATIONS
1. Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs and earn advanced degrees and education credentials.	<ul style="list-style-type: none"> <li>■ Invest in increasing public awareness of the unique value of programs in Jewish education.</li> <li>■ Provide programs that teach skills aligned with market demands as well as advancements in scholarly knowledge.</li> </ul>
2. Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.	<ul style="list-style-type: none"> <li>■ Offer customized learning plans for competencies tied to professional careers.</li> <li>■ Identify barriers to program impact in specified areas.</li> </ul>
3. Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.	<ul style="list-style-type: none"> <li>■ Establish strong partnerships with employers to ensure maximum benefits of employees' professional learning.</li> <li>■ Continue to offer leadership development opportunities.</li> </ul>
4. Develop the infrastructure that will sustain new programs.	<ul style="list-style-type: none"> <li>■ Form collaborative relationships to save on program development and operating costs.</li> <li>■ Provide mentoring and assistance to online course instructors.</li> <li>■ Capitalize on the different schools within an institution as well as partnerships with outside organizations to offer a wider range of coursework and expose students to interdisciplinary perspectives on educational practice.</li> </ul>
5. Identify areas of programmatic and interinstitutional collaboration for improving program quality.	<ul style="list-style-type: none"> <li>■ Strive toward linking the mission of the institution to values of collaboration.</li> <li>■ Create a mission statement for interinstitutional collaboration.</li> <li>■ Invest in identifying and creating strategies and structures that will move the grantees beyond valuing collaboration to enabling and sustaining collaboration.</li> <li>■ Allocate time for interinstitutional collaboration as part of events and conferences.</li> <li>■ Leverage intra-institutional collaboration to support interinstitutional collaboration initiatives.</li> </ul>



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