Independent Evaluation of the
Jim Joseph Foundation's Education Initiative

Final Report

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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;[1] eight new certificate, leadership, and professional development programs;[2] two new induction programs;[3] and four new seminars within the degree programs.[4] The Education Initiative also supported financial assistance for students in eight other advanced degree programs.[5] 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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[1] 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).

[2] 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).

[3] The new induction programs are as follows: the Induction and Retention Initiative (HUC-JIR) and the New Teacher Induction (YU).

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

[5] 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
PROGRAM LEVEL	1. Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs and earn advanced degrees and education credentials.	■ Financial assistance ■ Enrollment management technical assistance ■ Recruitment specialists ■ Funding for new programs (e.g., online learning)	■ Improve marketing and enrollment management practices. ■ Eliminate obstacles to participation.	■ Increased numbers of participants ■ Increased diversity of participants
	2. Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.	■ Instructional and administrative personnel ■ Mentors ■ Technology specialists ■ Content advisors	■ Offer choice of program content, schedule, format, and duration. ■ Support translation of theory into practice.	■ Improved professional knowledge ■ Improved practice ■ Higher career aspirations
	3. Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.	■ Instructional and administrative personnel ■ Mentors ■ Alumni engagement coordinators	■ Induction programs ■ Follow-up professional development ■ Alumni network	■ Increased job retention and promotion rates ■ Increased numbers of emerging leaders
INSTITUTION LEVEL	4. Develop the infrastructure that will sustain new programs.	■ Faculty professional development ■ Asynchronous and collaborative online learning environment ■ Financial sustainability planning tools and processes	■ Identify and implement staffing, marketing, fundraising, and management practices that are needed for program sustainability.	■ Improved processes for financial sustainability ■ Improved infrastructure for developing, implementing, and scaling up programs
	5. Identify areas of programmatic and interinstitutional collaboration for improving program quality.	■ Knowledge sharing platforms and networks ■ Funding for joint programs ■ Interinstitutional activities coordinator	■ Combine resources across institutions to improve faculty knowledge and skills, program quality, and alumni services.	■ Increased numbers of joint programs and initiatives ■ Improved culture of collaboration

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?
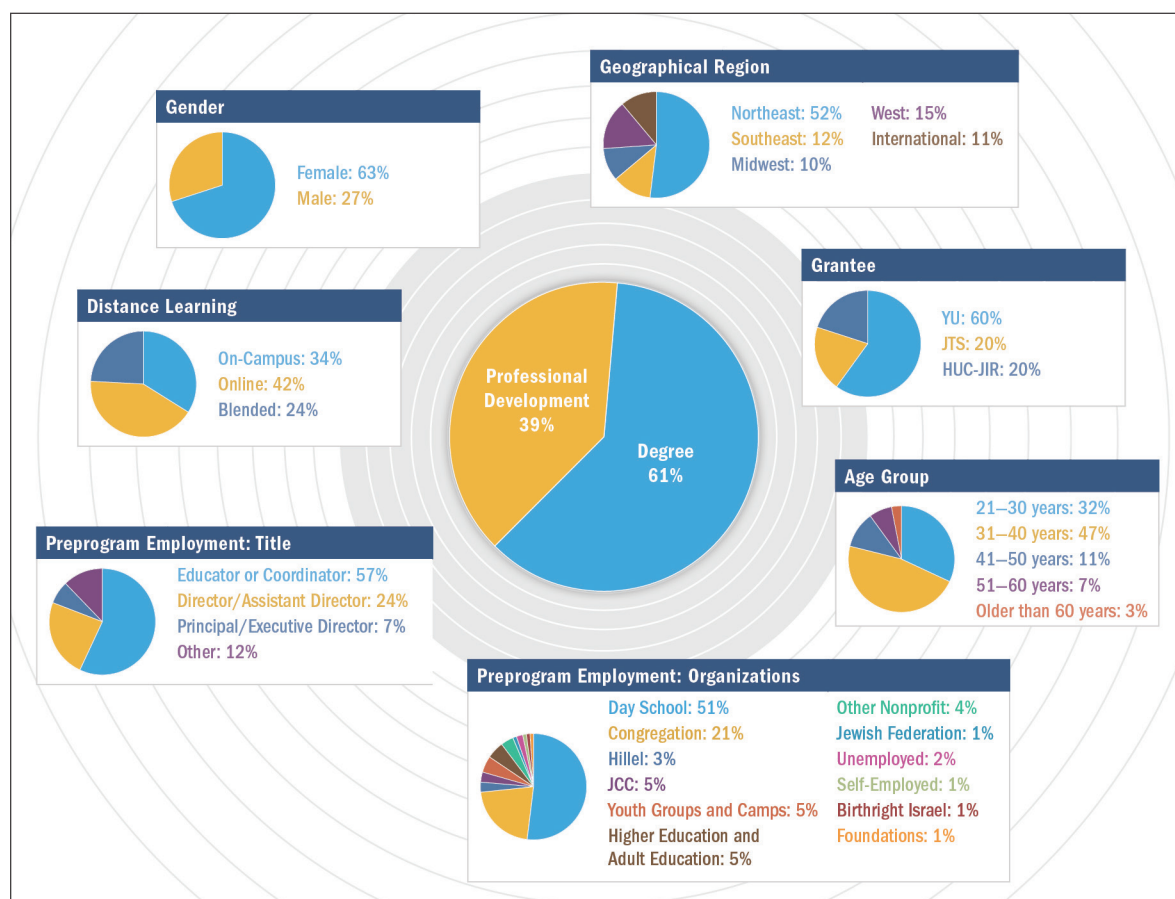
The study of the Education Initiative used multiple sources of data to gather information about participants' history, attitudes, professional learning and practice, and program satisfaction. AIR researchers administered online surveys to more than 800 program participants and alumni and conducted phone 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

Gender
Female: 63%
Male: 27%

Distance Learning
On-Campus: 34%
Online: 42%
Blended: 24%

Preprogram Employment: Title
Educator or Coordinator: 57%
Director/Assistant Director: 24%
Principal/Executive Director: 7%
Other: 12%

Geographical Region
Northeast: 52%   West: 15%
Southeast: 12%   International: 11%
Midwest: 10%

Grantee
YU: 60%
JTS: 20%
HUC-JIR: 20%

Age Group
21–30 years: 32%
31–40 years: 47%
41–50 years: 11%
51–60 years: 7%
Older than 60 years: 3%

Professional Development 39%
Degree 61%

Preprogram Employment: Organizations
Day School: 51%   Other Nonprofit: 4%
Congregation: 21%   Jewish Federation: 1%
Hillel: 3%   Unemployed: 2%
JCC: 5%   Self-Employed: 1%
Youth Groups and Camps: 5% Birthright Israel: 1%
Higher Education and   Foundations: 1%
Adult Education: 5%

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

Educational Research and Theory

Knowledge Translation

- ▶ Explicit instruction of leadership skills
- ▶ Demonstrating how to integrate Jewish content
- ▶ Experiential Jewish education
- ▶ Use of developmental-contextual models
- ▶ Practical tools for immediate implementation

ALIGNMENT	MENTORING	COHORT DIVERSITY
Guided selection of courses, lecturers, and projects based on participant background and learning goals	Continuous and regular formal and informal communications with faculty members and veteran professionals about theory and application	Information exchange with professionals from different organizations and communities with different ideologies and perspectives

Professional knowledge, practice, commitment, and relationships

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.	▪ Invest in increasing public awareness of the unique value of programs in Jewish education. ▪ Provide programs that teach skills aligned with market demands as well as advancements in scholarly knowledge.
2. Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.	▪ Offer customized learning plans for competencies tied to professional careers. ▪ Identify barriers to program impact in specified areas.
3. Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.	▪ Establish strong partnerships with employers to ensure maximum benefits of employees' professional learning. ▪ Continue to offer leadership development opportunities.
4. Develop the infrastructure that will sustain new programs.	▪ Form collaborative relationships to save on program development and operating costs. ▪ Provide mentoring and assistance to online course instructors. ▪ 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.
5. Identify areas of programmatic and interinstitutional collaboration for improving program quality.	▪ Strive toward linking the mission of the institution to values of collaboration. ▪ Create a mission statement for interinstitutional collaboration. ▪ Invest in identifying and creating strategies and structures that will move the grantees beyond valuing collaboration to enabling and sustaining collaboration. ▪ Allocate time for interinstitutional collaboration as part of events and conferences. ▪ Leverage intra-institutional collaboration to support interinstitutional collaboration initiatives.

Introduction

PURPOSE

The Jim Joseph Foundation created the Education Initiative to increase the number and type of program offerings and support available to students who enter and graduate from three major Jewish higher education institutions. Recognizing the importance of higher education in efforts to increase both the number and the quality of professional Jewish educators, the Jim Joseph Foundation awarded three $15 million grants to premier Jewish higher education institutions ($45 million total). The purpose of these grants was to double the number of educators and educational leaders who earn advanced degrees in Jewish education and provide access to an additional substantial number of educators to professional development in Jewish education. The three grantees—Hebrew Union College–Jewish Institute of Religion (HUC-JIR), the Jewish Theological Seminary (JTS), and Yeshiva University (YU)—expanded their programing under the Education Initiative from 2010 to 2016. The grantees designed and piloted many new programs, including six master's and doctoral degree programs or concentrations; eight certificate, leadership, and professional development programs; two induction programs; and four seminars within the degree programs. The Education Initiative also enabled financial assistance for students in eight other advanced degree programs. Appendix A describes the programs piloted under the Education Initiative.
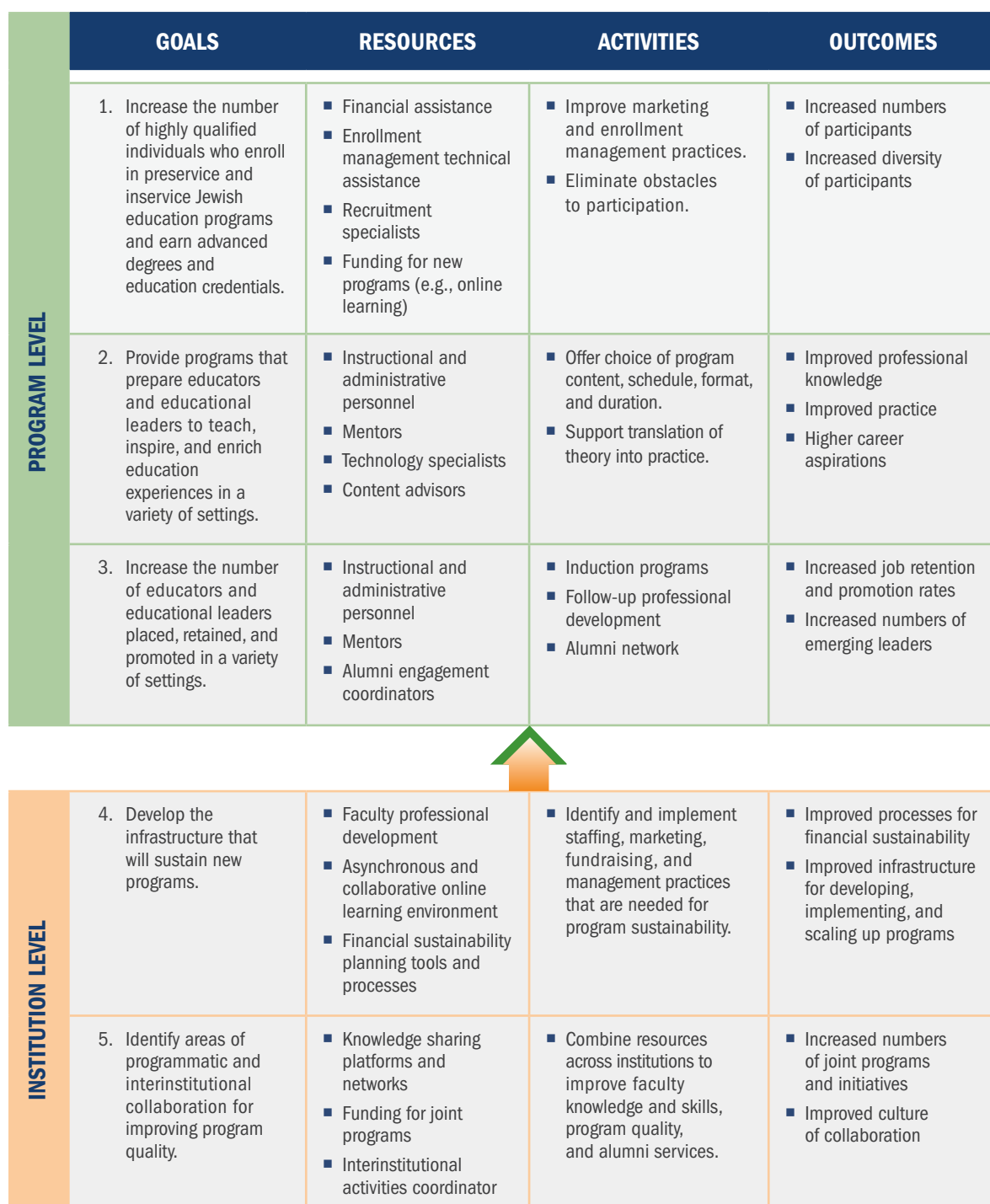
The Education Initiative's theory of change assumes that new program design and institutional capacity building are interrelated and mutually supportive efforts. The Education Initiative supported new program design plus implementation and supporting operations, including management and oversight, marketing and recruitment, and educational technology infrastructure. The theory of change depicted in Exhibit 1 shows the goals, resources, activities, and measurable outcomes of the initiative. Three goals of the initiative focused on program development (boxes outlined in green in Exhibit 1). Two additional goals focused on institutional capacity building (boxes outlined in orange in Exhibit 1). The five goals are as follows:

1. **Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs.** This goal addressed the size and diversity of the applicant pool. The resources dedicated under this goal were used to promote awareness of the availability and value of programs and to remove barriers to participation, such as cost, geographical distance, and schedule. In addition, the development of new programs aimed to attract professionals who were looking for specific content (e.g., leadership skill training).

2. **Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.** This goal addressed program content. The resources dedicated to achieving this goal were used to design master's degree programs, a doctoral degree program, and certificate programs as well as leadership institutes and short online courses.

3. **Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.** This goal addressed program content and career services to promote job readiness and the career advancement of graduates in Jewish education settings. The

resources dedicated to achieving this goal were used to align program content with the needs of the field and to provide the professional mentoring that both program participants and alumni need to succeed in their respective workplaces.

4. **Develop the infrastructure that will sustain new programs.** This goal addressed multiple aspects of institutional capacity building, including personnel, information technology infrastructure, financial sustainability strategies, and effective management and administration structures. The resources dedicated to achieving this goal were used to create financial sustainability plans, hire instructors, train mentors, establish an infrastructure for online instruction, and expand marketing and enrollment management operations.

5. **Identify areas of programmatic and interinstitutional collaboration for improving program quality.** This goal addressed collaboration and knowledge sharing among the three grantee institutions. The resources dedicated to achieving this goal were used to create a joint leadership institute, a joint faculty professional development program, a shared alumni network, and ongoing communications and knowledge sharing among presidents, deans, and program directors.

Exhibit 1. The Theory of Change for the Education Initiative

	GOALS	RESOURCES	ACTIVITIES	OUTCOMES
PROGRAM LEVEL	1. Increase the number of highly qualified individuals who enroll in preservice and inservice Jewish education programs and earn advanced degrees and education credentials.	▪ Financial assistance ▪ Enrollment management technical assistance ▪ Recruitment specialists ▪ Funding for new programs (e.g., online learning)	▪ Improve marketing and enrollment management practices. ▪ Eliminate obstacles to participation.	▪ Increased numbers of participants ▪ Increased diversity of participants
	2. Provide programs that prepare educators and educational leaders to teach, inspire, and enrich education experiences in a variety of settings.	▪ Instructional and administrative personnel ▪ Mentors ▪ Technology specialists ▪ Content advisors	▪ Offer choice of program content, schedule, format, and duration. ▪ Support translation of theory into practice.	▪ Improved professional knowledge ▪ Improved practice ▪ Higher career aspirations
	3. Increase the number of educators and educational leaders placed, retained, and promoted in a variety of settings.	▪ Instructional and administrative personnel ▪ Mentors ▪ Alumni engagement coordinators	▪ Induction programs ▪ Follow-up professional development ▪ Alumni network	▪ Increased job retention and promotion rates ▪ Increased numbers of emerging leaders
INSTITUTION LEVEL	4. Develop the infrastructure that will sustain new programs.	▪ Faculty professional development ▪ Asynchronous and collaborative online learning environment ▪ Financial sustainability planning tools and processes	▪ Identify and implement staffing, marketing, fundraising, and management practices that are needed for program sustainability.	▪ Improved processes for financial sustainability ▪ Improved infrastructure for developing, implementing, and scaling up programs
	5. Identify areas of programmatic and interinstitutional collaboration for improving program quality.	▪ Knowledge sharing platforms and networks ▪ Funding for joint programs ▪ Interinstitutional activities coordinator	▪ Combine resources across institutions to improve faculty knowledge and skills, program quality, and alumni services.	▪ Increased numbers of joint programs and initiatives ▪ Improved culture of collaboration

HISTORY AND RATIONALE

The Education Initiative was created in response to a growing concern from Jewish education providers about a shortage in qualified educators. More than 25 years ago, the Commission on Jewish Education (1990), in a report titled *A Time to Act*, made the case for offering a number of preparation programs for Jewish educators that would be proportionate to the growing number of formal and informal Jewish education programs and the students they serve. Later studies reported

a continued shortage in highly qualified Judaic studies teachers, curriculum developers, and educational leaders (Ben-Avie & Kress, 2006, 2008; Krakowski, 2011; Sales, 2007). Three main reasons articulate why degree and professional preparation programs prior to the Education Initiative did not keep pace with the required scope and level of preparation of educators:

- The large number of new teachers and leaders in the field requires attention relative to how well prepared these professionals are for their new job responsibilities. Insufficient professional preparedness is a common reason for new professional turnover (Huang & Dietel, 2011; Schaap, 2009). Thousands of new educators join the Jewish education workforce every year. These professionals work in Jewish day schools, supplementary schools, camps, Hillel, Jewish community centers (JCCs), and other nonprofit organizations. (See Schneider, Kidron, Brawley, & Greenberg [2015] for a summary of the literature.)

- A rapid increase in the variety of immersive educational experiences, such as service learning and outdoor programs (Informing Change, 2014; Wertheimer, 2009), calls for a better understanding of "what works" in program development and the promotion of the occupational status of educators and directors through rigorous professional preparation.

- Jewish day schools need to stay competitive among schools that use evidence-based practices (Brandsford, Stipek, Vye, Gomez, & Lam, 2009; Dynarski, 2015) and align their programs with the Common Core State Standards—both of which require educator preparation and professional development.

The initiative also aimed to support the continued education of emerging leaders. A report by Leading Edge (2014) identified a shortage in programs focused on cultivating educational leaders in mid- and senior-level leadership positions in Jewish nonprofit organizations. This report found that growth in the number of Jewish nonprofit organizations has put a large strain on the capacity of professional development providers to adequately run numerous leadership preparation programs. The aging of the baby boomer generation means that a large number of current executives soon will retire, creating a significant need for the development and improvement of emerging leaders. Researchers also have documented a similar shortage of programs designed for directors, principals, and executive officers in the secular world and have cautioned that without proper training, leaders are likely to experience job burnout and frustration and will inefficiently manage their programs or organizations (Hoefer & Sliva, 2014). These professionals desire new approaches and leadership skills to help them increase the capacity of their organizations in areas such as resource development, collaboration, integrative services, technology, tools for instruction and decision making, diversity and inclusiveness, and evidence-informed practices (Hopkins, Meyer, Shera, & Peters, 2014).

Despite the high level of educational attainment of many Jewish education professionals, including heads of schools and teachers, too few have attended programs with a specialization in Jewish education. Increasingly, educational leaders are expected to not only manage programs and schools but also provide fundamental rethinking of what schools should do and how to do it. To make continuing education effective, programs should promote the critical competencies sought by employers in the Jewish education field. Research on the effects of advanced degree programs on teachers in public schools showed that effective programs are aligned with the educational mission and vision of schools as well as curricular materials in teachers' schools (Hill, 2007). In terms of subject matter knowledge, programs should be aligned with the job responsibilities of educational professionals (Blank & Alas, 2009; Ingersoll, 2005). Also, programs should be of substantial length

and intensity and include immediate application and practice (Yoon, Duncan, Lee, Scarloss, & Shapley, 2007). Therefore, educators and educational leaders can benefit more from programs in Jewish education than degree and certificate programs that are not geared toward the Jewish education setting.

The Education Initiative was an opportunity to gain understanding of the types of programs that most effectively promote professionalism in the field. As noted by Jehuda Reinharz in a 2009 article published in *JWeekly*, "It is not enough if we successfully replace the scholars we lose. We need more and better, still." The three grantees aimed to develop programs using what is known today as best practices in higher education. Researchers have identified strategies that support students' academic success and postgraduation employment outcomes, including advising, counseling, coaching, and mentoring (McWilliams & Beam, 2013; Zembytska, 2016) and hybrid courses that combine face-to-face and online instruction (McGee & Reis, 2012). By implementing practices such as these, the grantees sought to build learning environments that flexibly accommodated the needs of all learners.

The Education Initiative aimed to remove barriers to participation in academic programs. Some public districts in the United States require teachers to complete a master's degree within several years of hiring, and many others reward it with salary increases (Hill, 2007). Moreover, increasingly, public school systems integrate into their annual performance evaluation systems clear plans for teachers to participate in professional development (Goe, Biggers, & Croft, 2012; Zweig, Stafford, Clements, & Pazzaglia, 2015). In contrast, Jewish day schools do not follow any specific policies for teacher learning. In the absence of system requirements and incentives, the removal of barriers for professional learning (e.g., tuition cost, location, and schedule) is especially important to attract a significant number of professionals to degree and certificate programs.

Evaluation Methodology

This report summarizes the results of an independent evaluation conducted by American Institutes for Research (AIR), which 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.

Program Participant Survey

The evaluation team administered the survey to participants in programs developed or revised under the Education Initiative.[1] All participants received e-mail invitations to complete an online survey during the first year of their respective programs. In addition, those participants in degree programs received invitations to complete an online survey during the second year of their programs. The online survey included 47 questions about factors that affect enrollment, the impact of the program on professional growth, and the characteristics of the respondents. After completing their programs, all participants received invitations to complete a shorter, 22-question survey about their satisfaction with the program, the impact of the program on their career and professional growth, and their demographic characteristics. Overall, the response rates were high. Across the degree programs, 631 participants were invited to take the survey, and 501 individuals completed the survey at least once (79 percent response rate). Across the professional development programs, 428 individuals were invited to take the survey, and 360 individuals completed it (84 percent response rate). In total, 861 participants completed the survey.

Faculty Survey

The faculty survey included 17 questions about faculty interest in the eLearning Faculty Fellowship (eLFF), knowledge of technology, and attitudes toward intra-institutional and interinstitutional collaboration. Of 152 faculty members who were contacted, 137 (54 from HUC-JIR, 35 from JTS, and 48 from YU) completed the survey during at least one of the three survey administration points (spring 2013, spring 2014, and spring 2015), yielding a 90 percent response rate. Of this sample, 87 faculty members (57 percent) took the survey at both the baseline (2013) and the two-year follow-up (2015).

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[1] Because of the short duration of their programs (2-week and 4-week courses), participants in the YU professional development modules were not contacted to take the study survey.

Participant Interviews

Phone interviews were conducted with 203 graduates of the degree and professional development programs. These interviews lasted between 20 and 30 minutes. The interviews included questions about participants' reasons for enrolling in the programs; other professional development opportunities available; the application of knowledge acquired through the program; relationships with other members of the cohort and faculty; and the impact of the programs on compensation, job performance, and career.

Employer Interviews

Phone interviews were conducted with 108 employers. These interviews lasted between 10 and 20 minutes. The program participants were asked to nominate their direct supervisor for an interview. The interviews focused on employers' perceptions of the importance of obtaining a master's degree or participating in professional development, their willingness to support participation in such programs, and the benefits of the new knowledge and skills to their schools or programs.

Administrator Interviews

The evaluation team conducted annual interviews with the president, the dean of the school of education, project managers, and program directors at each grantee institution. These interviews were conducted either in person or by phone and were organized according to the five goals of the Education Initiative. The interviewees were asked to describe accomplishments to date, challenges encountered, and plans for future program implementation and capacity building.

Participant Records

The grantees provided student records that included information about participants' enrollment status, state of residence before program enrollment, employment prior to program enrollment, scholarships, and employment after completing a program. Using publicly available records and alumni surveys, the study team verified employment information and updated employment information for alumni one year after graduation.

Expansion and Diversity
of the Jewish Education Pipeline

INTRODUCTION

This section of the report addresses the first research question: In what ways has the Education Initiative expanded the Jewish education pipeline?

Many of the new programs developed under the Education Initiative targeted professionals with multiple years of experience in Jewish education settings. Work experience may strengthen the relationship between educational level and job performance because it will likely provide both more applied knowledge during and immediately after enrollment and tacit, practical knowledge that is less frequently provided by formal education. When coupled with in-depth, analytical knowledge from formal education, work experience may be a greater enhancement to job performance (Ng & Feldman, 2009). However, working professionals experience obstacles to enrolling and persisting in academic programs, including financial pressures and responsibilities related to having families and jobs (van Rhijn, Lero, Bridge, & Fritz, 2016). To address these needs, experts in higher education have recommended that institutions use strategies, such as distance learning, as a means to improve flexibility in time scheduling and the structure of offerings (Bell & Federman, 2013). The three grantees have adopted such practices to reach the enrollment goals of the new programs and make the programs accessible to all eligible applicants, including busy professionals and geographically remote participants. The findings here summarize the results of these efforts.

FINDINGS

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 program participants at enrollment). Approximately 74 percent of the new enrollees participated in programs that did not exist before the Education Initiative or whose operation was substantially transformed through program development and faculty hiring as part of the Education Initiative. The remaining new enrollees (26 percent) received scholarships funded by the Education Initiative.

Participants worked in organizations directly supported by the Jim Joseph Foundation through other grants. These organizations include the Hillel national office and higher education institutions (45 individuals), youth groups (e.g., B'nai Brith Youth Organization [BBYO]) and camps (45 individuals), JCCs (45 individuals), and Jewish day schools (769 individuals). Therefore, through the Education Initiative, the Jim Joseph Foundation strengthened the workforce of its other grantees.

The participants were geographically diverse. Most of the newly enrolled professionals resided in the United States (89 percent) and worked in 37 states (Appendix B). Of the U.S. students, approximately one half lived in the Northeast. The remaining U.S. students came from the South, the

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

Gender
Female: 63%
Male: 27%

Geographical Region
Northeast: 52%
Southeast: 12%
Midwest: 10%
West: 15%
International: 11%

Distance Learning
On-Campus: 34%
Online: 42%
Blended: 24%

Grantee
YU: 60%
JTS: 20%
HUC-JIR: 20%

Professional Development 39%

Degree 61%

Age Group
21–30 years: 32%
31–40 years: 47%
41–50 years: 11%
51–60 years: 7%
Older than 60 years: 3%

Preprogram Employment: Title
Educator or Coordinator: 57%
Director/Assistant Director: 24%
Principal/Executive Director: 7%
Other: 12%

Preprogram Employment: Organizations
Day School: 51%
Congregation: 21%
Hillel: 3%
JCC: 5%
Youth Groups and Camps: 5%
Higher Education and Adult Education: 5%
Other Nonprofit: 4%
Jewish Federation: 1%
Unemployed: 2%
Self-Employed: 1%
Birthright Israel: 1%
Foundations: 1%

Southeast, the West, and the Midwest. The programs also attracted international students (11 percent of the total number of participants). International students came from several countries, including Canada, Israel, Great Britain, Chile, Brazil, and South Africa.

The Education Initiative targeted both experienced and aspiring educational leaders. About one half of the new enrollees 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 JCCs, 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. Students reported that financial aid, customized program content that aligned with their learning goals, locations, and schedules were important factors that influenced their decisions to enroll.

The recruitment accomplishment also was supported by multiple marketing activities, such as brochures; website revisions; Google Ad campaigns; mass mailings and e-mail blasts; and increased travel of recruiters to colleges, conferences, and Jewish day schools. All three grantees developed

intensive and high-touch marketing efforts—strategies that were costly and labor intensive—to raise awareness of the value of degree and professional development programs in Jewish education. Many students noted that direct access to faculty members prior to enrollment and how administrators responded to their special requests influenced their decision to enroll. The following quotation demonstrates the importance of responsiveness of the grantees to students:

> I was allowed to begin the program in the summer as opposed to waiting until the fall semester. This allowed me to determine if I could truly accomplish a doctorate program, while continuing to work full time and be a wife and mother. Had I not been able to begin in the summer, I am not sure that I would have pursued the program since I needed to see if I could manage the program.

Alumni and friends of the grantee institutions played a key role in recruitment. High proportions of both degree and professional development program participants reported making an enrollment decision affected by an employer, a friend, a mentor, or a parent (77 percent for the degree program participants and 84 percent for the professional development program participants). The following quotation exemplifies the messages that alumni communicated when recommending programs:

> The program is very rigorous, and, as such, I recommended this program only to those individuals that I thought were willing to put the time and effort into their studies and capable of succeeding. I told them that this program is invaluable. It is one of the few programs that has classes during the day, which is important for those people with familial commitments in the evening; it allows the student to get field experience, whereby the student can put the theory he is learning into practice, which is essential to becoming an effective teacher; the tuition is covered by the very generous Jim Joseph Foundation; and it deals specifically with Jewish education rather than education in general.

However, marketing and recruitment tasks were more daunting than expected, especially for the degree programs. On the one hand, within the field of Jewish education, the grantees had little competition. Only 12 percent of the master's and doctoral students said that they had applied to other institutions. An additional 34 percent of these students reported that they would have pursued an advanced degree in later years if they had not been accepted into their current programs. On the other hand, many professionals were unsure about the value of an advanced degree in Jewish education or preferred to accept a new job rather than make time for a rigorous academic program. Prospective students who applied to master's degree programs tended to have more years of professional experience and a stronger conviction that a master's degree in Jewish education is important to them compared with prospective students who inquired but did not apply. Dr. Rona Novick, the dean of the Azrieli Graduate School of Jewish Education and Administration, summarized the challenge of communicating about the unique value of a degree in Jewish education:

> Hiring content area experts with no pedagogical skills and relevant Jewish knowledge is a huge loss to the field. Harvard will not tell you how to inspire and ignite children to connect to sacred Jewish stories; how to align with the mission of the school; or how to tackle the challenges of Judaic studies, such as teaching in a foreign language [or] addressing complicated questions.

Recruiting middle and senior management professionals to degree and professional development programs required customization of the programs and targeted marketing. Middle and senior management professionals noted that schedule flexibility and customization of the content to their specific learning interests dramatically influenced their decisions to enroll. Given the costs associated with continuing education, one might expect that professionals who have higher salaries would be more willing to pay for continuing education. Yet, professionals early in their careers were more willing to enroll without financial assistance. This attitude has been attributed, in part, to the high competition for entry-level positions, at least in large Jewish communities. Although recruitment for the part-time degree programs was generally more successful than for the full-time programs, even programs with shorter durations and flexible schedules had recruitment challenges related to concerns by prospective students about balancing school and work. In addition, one fifth of the professional development program participants considered leaving their programs because the programs conflicted with their job responsibilities.

DISCUSSION AND RECOMMENDATIONS

Institutional reputation, program development, financial assistance, and marketing efforts enabled the grantees to recruit individuals who did not seek continued education at that time. An important accomplishment of the grantees under the Education Initiative was motivating professionals to set higher career goals for themselves and continue their education. Through these recruitment efforts, the initiative made potential contributions to the workforce. This is noteworthy given that higher education institutions in the United States are still awarding too few master's degrees in Jewish education. In 2013, the number of individuals who completed advanced degree programs in either Jewish education or education and Jewish studies was 3 percent of the total number of new teacher hires in Jewish day schools.[2] Comparatively, the number of individuals who completed master's in education degrees was 46 percent of the new teacher hires in public and private schools in the United States.[3]

However, the need to recruit to multiple new programs was a strain on the recruiters and required the grantees to rethink their strategies for marketing and recruitment. Unlike similar efforts in public education, which draw on the identification of eligible candidates by district (e.g., a recent Wallace Foundation, five-year, $47 million initiative to help universities improve their principal preparation programs in partnership with paired districts), the grantees identified and maintained communications with every prospective student. All three grantees reported intentions to further improve on the efficiency and scope of their marketing strategies in the future and continue to expand the applicant pool. Across recent years, marketing strategies in higher education have become more sophisticated, as illustrated by the *Journal of Marketing for Higher Education*, which is devoted exclusively to the profession. In addition to program-specific recruitment efforts, investments in institutional capacity also can affect recruitment results. Such investments may include faculty presentations and publications (McKnight, Paugh, Waltz, & McKnight, 2015). Our survey data showed that the prestige of a particular institution influenced the enrollment decisions for

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[2] The number of graduates (157) is based on data collected by Rosov Consulting (2016). The number of new teacher hires in Jewish day schools (5,000 teachers) is based on estimates discussed by Schneider et al. (2015).

[3] The annual number of graduates (245,000 individuals) and new teacher hires (545,000 teachers) is based on data reported by the National Center for Education Statistics (2016).

approximately one half of the degree and professional development program participants (47 percent and 51 percent, respectively).

AIR has two recommendations for expanding and diversifying the Jewish education pipeline:

- **Invest in increasing public awareness of the unique value of programs in Jewish education.** To further increase the diversity of program participants, institutions should convey to prospective students what is uniquely important about a program in Jewish education versus a program in general education. By emphasizing program value as well as the unique positioning of the institution offering the program, institutions can inspire professionals to pursue the programs that were designed for preparing professionals to work in Jewish education settings.

- **Obtain a balanced approach that is responsive to market demands and represents advancements in scholarly knowledge.** In a competitive market, programs attract prospective students to the extent that they serve the interests of both employers and employees. At the same time, programs should identify ways to educate the field about emerging theoretical frameworks and evidence-based practices and propose what may be the next "big ideas" for high-quality academic training for Jewish education professionals.

Program Development: Accomplishments and Lessons Learned

INTRODUCTION

This section of the report addresses the second research question: What did the new degree and professional development programs accomplish?

The data collected in this evaluation addressed improvements in program design and delivery as an end goal in itself. Also, the data addressed new program development as a means to support improved professional practice and program quality across Jewish education settings. The content and design of degree programs affects graduates' employment outcomes (Schneider, 2014).

The learning environment provided by advanced degree and professional development programs with durations of at least one year serve as a foundation for professional networking, a critical reflection on practice, and the translation of theory into practice. Common strategies for achieving a positive environment include opportunities for students to connect with other cohort members (e.g., through shared seminars, critical friends groups, and peer mentoring) and engage in one-on-one advising relationships with faculty members. In addition, an open-door policy fosters student and faculty interaction, which may include informal, unstructured interactions (Gardner, 2010). Interactions with academic advisors and other faculty members affect the career aspirations and self-efficacy of early career professionals (Antony, 2002; Kuh, Kinzie, Schuh, & Whitt, 2005; Lechuga, 2011). Learning communities formed by students and alumni can offer social and emotional support and additional learning and networking opportunities (Brown, 2011; Smith, Frey, & Tollefson, 2003).

FINDINGS

Most of the master's degree program participants were highly satisfied with the effects of their programs on their professional growth. Nearly all the program participants (90 percent) rated their programs as either effective or very effective in providing the knowledge and skills they needed to be successful at their jobs. According to participant self-reports, 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 participation, most of the program participants (76 percent) introduced experiential Jewish education (EJE) at their workplaces. In addition, more than one half of the program 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 influenced the participants by infusing Jewish values into programs (75 percent) and introducing new instructional practices (73 percent). One participant noted the following:

> This program has been instrumental in my growth as a person and as an educator. Being a professional out in the field and working on these courses, where I could immediately implement what I was learning at the time that I'm learning it and have a
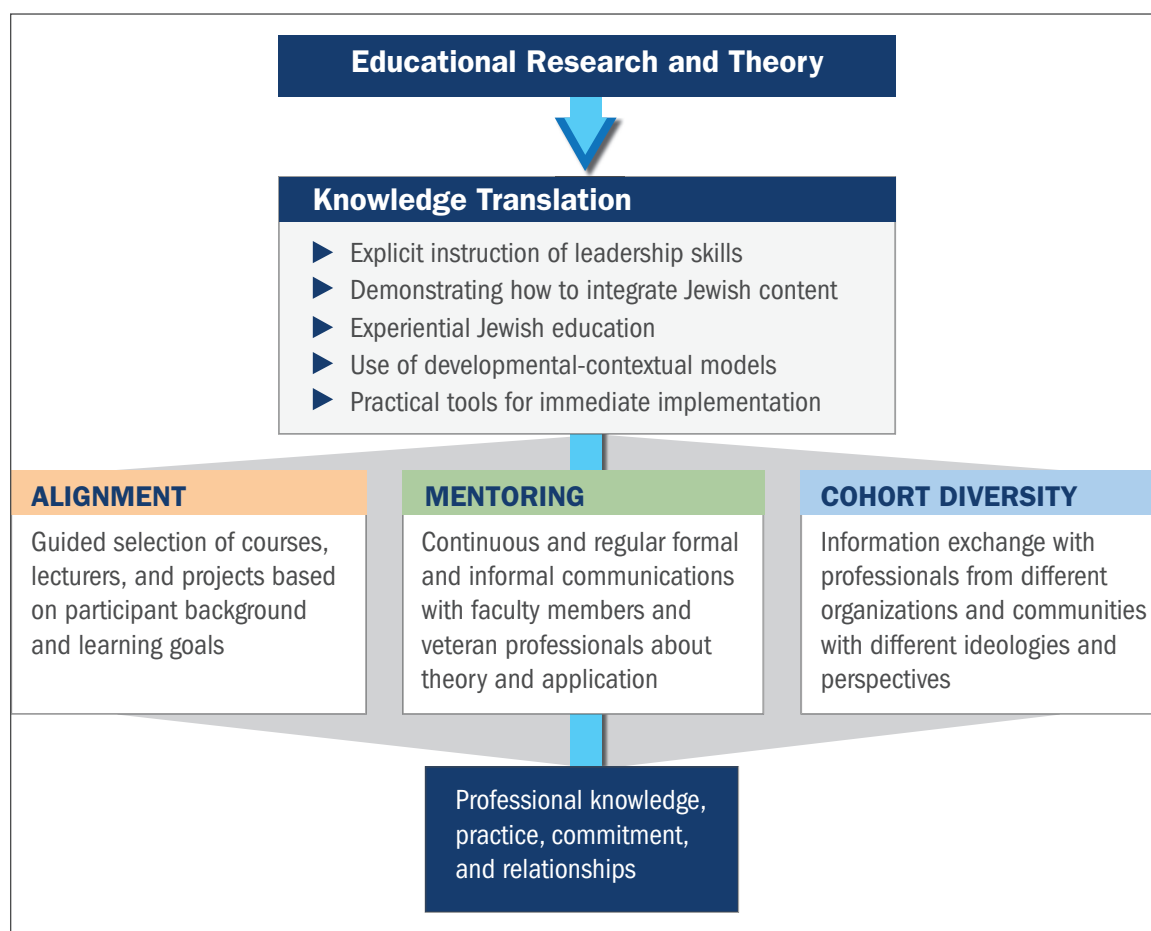
live learning lab, where I can try things out and see how they work and experiment and grow what was already a good program, but grow it and make it even better, was an incredible way to immediately apply the learning that was being given.

Employers expressed strong support for the degree and professional development programs in Jewish education. Employers noted that their employees had higher levels of professional self-esteem (95 percent), were motivated to train fellow colleagues (90 percent), and introduced new instructional practices (83 percent). According to both participant and employer reports, all the program participants who were in a leadership position created learning opportunities for staff using their newly acquired tools and knowledge. One program participant described the following example:

I significantly increased the amount of money and time that was going into professional development. The synagogue wasn't putting money into professional development, so I had to deal with the board and with the finances and get all of that to change the perception of what professional learning was. When I hired new staff, I began including a question in my interviews about how interested people are in professional development and growing themselves as they're in the position. I created professional learning communities. We changed staff meeting time so it wasn't all about upcoming scheduling and events, but it was all about learning and so the time spent was much more valued. The faculty was broken into learning teams where they could develop something that they needed for the faculty at the moment—what they were teaching or who were their students—so that it was immediately applicable. I really transformed what professional learning looks like for our faculty and implemented a lot of current trends and patterns into what I was doing, so it was a really good use of people's time. They felt really valued. They were learning. They were growing. The whole environment of the school changed once we became learners, and they could see the impact of what we were doing on their day-to-day teaching.

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; in addition, the views of both the program participants and their employers on the program components and the conditions of the learning environment 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 positioned to do.

Exhibit 3. A Framework for Program Design

Educational Research and Theory

Knowledge Translation

- ▶ Explicit instruction of leadership skills
- ▶ Demonstrating how to integrate Jewish content
- ▶ Experiential Jewish education
- ▶ Use of developmental-contextual models
- ▶ Practical tools for immediate implementation

ALIGNMENT

Guided selection of courses, lecturers, and projects based on participant background and learning goals

MENTORING

Continuous and regular formal and informal communications with faculty members and veteran professionals about theory and application

COHORT DIVERSITY

Information exchange with professionals from different organizations and communities with different ideologies and perspectives

Professional knowledge, practice, commitment, and relationships

Knowledge translation was a multifaceted and important part of the programs. It included explicit instruction of leadership skills and demonstrated how to integrate Jewish content, EJE, and practical tools for immediate implementation. The program participants named five types of practical information they received that enabled them to translate knowledge into practice:

- Explicit instruction of leadership skills

- How to integrate Jewish content into a variety of educational activities

- The EJE framework and tools

- The use of models that take into account developmental stages of cognitive, social, and emotional development within the context of instructional decision making

- Other practical tools for immediate implementation

A master's program participant provided an example of a practical tool gained in a course about staff professional learning:

When I came here [as an executive director of a congregation], there was absolutely no performance review system. I instituted one. It was like the ones I had always done in my corporate background, where the boss was doing the assessment and then giving it to the person being assessed and then there was a response and that was the end of discussion. I actually turned that around after this course. I had everybody do self-assessments first; rather than responding to what I had said, I was responding to their perceptions, which was

much better. If you are handed an assessment [of your performance], the chances are you will be a little defensive about it. However, since they were assessing themselves, sometimes they were harder on themselves than I ever would have been. That perspective of flipping around a strategy to make it better was something I took from my course.

To characterize how the programs supported by the Education Initiative influenced the work of individuals as Jewish educators and educational leaders, AIR researchers developed the Professional Growth Matrix (Exhibit 4). This matrix which is divided into four quadrants, and each quadrant embodies a profile of professional growth. The *y*-axis represents the ability to implement processes in Jewish education settings. The *x*-axis represents content expertise in educational theory and research in Jewish education. Each dot on the graph in Exhibit 4 represents one participant.

Exhibit 4. Education Initiative Professional Growth Matrix
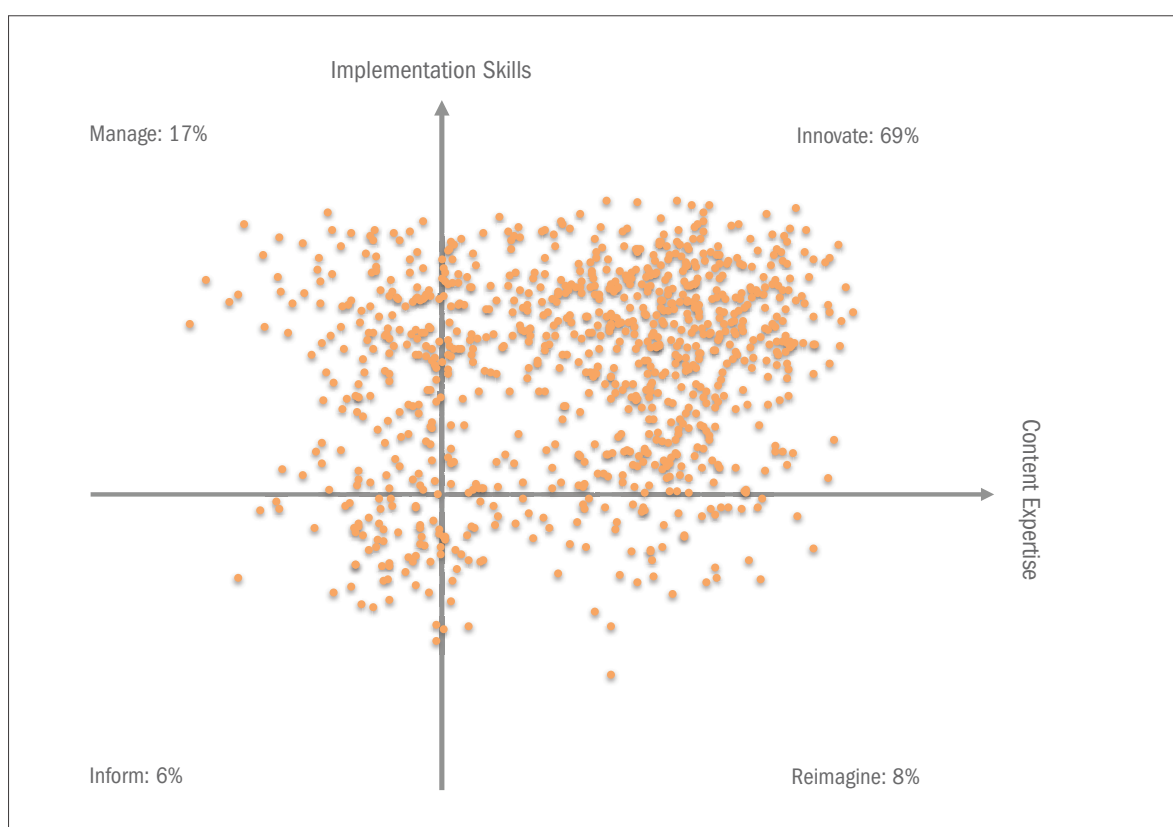
In Exhibit 4, each program participant is classified into one of the following four quadrants:

- **Innovate.** High levels of change in both content expertise and implementation skills that enable the translation of knowledge into practice (e.g., the development of organizational structures and instructional programs) in day schools, congregations, JCCs, or other educational settings.

- **Manage.** A high level of change in implementation skills that enables one to execute a program with high efficiency. Participants in this quadrant have less change in their ability to form a new vision for educational programs, practices, or policies.

- **Reimagine.** A high level of change in relevant educational knowledge that enables one to develop educational materials and become a source of wisdom for others. Participants in this quadrant have a lower level of change in managing or implementing at the organizational level.

- **Inform.** A low level of change in relevant knowledge and implementation skills. This quadrant typically represents new entrants to the field who work in positions that limit their ability to change current practice or professionals who have jobs that require a different set of knowledge and skills than those learned in the program.

Based on survey data from a sample of 830 individuals representing 13 master's degree, doctoral degree, certificate, and professional development programs, more than two thirds (69 percent) of the program participants have developed both management skills and content expertise in Jewish education—abilities that better position them as leaders in the field (see Exhibit 5).

Exhibit 5. Influence of Mentors on Professional and Personal Growth

My mentor has had a positive impact on my professional growth.	81%
My mentor has helped me translate what I learned in my courses into practice.	73%
My mentor is someone I can talk to when I am having a difficult time.	71%
My mentor has had a positive impact on my personal growth.	69%
My mentor helps me explore my career goals.	58%
My mentor has had a positive impact on my spiritual/religious growth.	34%

Participants who found their programs highly relevant to their professions were more satisfied with the programs. At the time of the survey, most of the degree program participants (78 percent) and all the professional development program participants have recommended the program to others. When asked why, many participants reviewed the programs through the lens of applicability to their jobs. As described by a school principal who enrolled in a part-time master's in Jewish education program:

> I was already a principal when I began the program, so most of what I was taught I already knew. However, I used what I learned about assessments in each class. I have introduced instructional supervision and positive behavior support to my school. These two have made significant changes in our staff, students, and parent body. Curriculum design helped me help teachers rethink their curriculum and instruction.

The programs supported by the Education Initiative had a low dropout rate. This strategy proved to be effective given the low overall dropout rate (8 percent). The survey data identified an additional number of participants (16 percent) who reported that they had considered leaving their programs. Most of these participants were disappointed with some elements of the curriculum and instruction and, in particular, the lack of applicability to their profession.[4] The grantees made deliberate efforts to assign course instructors who have the unique combination of scholarly knowledge and practitioner experience. This staffing practice was regarded as an important part of institutional capacity building (which is further described later in this report) that contributed to program quality. However, program 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 background, professional experience, and learning goals.

The program participants highly valued mentoring by experienced practitioners and faculty members. Based on survey ratings from 209 master's program participants in HUC-JIR and JTS, the majority of the program participants (81 percent) agreed or strongly agreed that their mentor had a positive impact on their professional growth (Exhibit 5).

Although many described contribution to professional growth as a sharpening of the skills learned in the program (e.g., by analyzing particular situations at work), others found a unique value in having a mentor. These participants found that their mentors influenced their perceptions of themselves as Jewish education professionals. As noted by a program participant,

> My mentor has a tremendous impact in connecting dots in all of my other experiences in life and rabbinical school; for the first time I felt able to articulate what drives me and what vision I feel driven towards.

Learning with a diverse group of professionals improved participants' ability to generalize knowledge and examine issues from a fresh perspective. In their survey narratives and interviews, the program participants described initially joining their programs with the goal of meeting other "like-minded educators." However, after experiencing learning in cohorts comprised of professionals from different Jewish education settings, they recognized the value of exposure to different experiences and opinions as part of their professional learning.

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[4]   Most of these participants (94 percent) chose not to drop out of their programs because of their belief in the importance of obtaining a degree or a certificate. The remainder (6 percent) chose not to drop out of their programs because of support offered by faculty, mentors, family, or friends.

About one fifth of the program participants transitioned to a different work setting postgraduation (e.g., from a camp to Jewish day school; from a congregation to a nonprofit organization). They regarded the exposure to a diverse group of professionals through the program as a type of job preparation that could not have been achieved otherwise. The program participants who emphasized the importance of diversity the most were those who described their job responsibilities as having to think "out of the box," create innovative programs, and increase enrollment in their educational institutions. Nevertheless, the program directors of the professional development programs expressed uncertainty about the desirable level of diversity within a cohort. They saw certain participant characteristics, such as similar levels of professional experience and shared learning goals as beneficial for creating a sense of a learning community within the program. As noted by a program director: "When we recruit for the program, we recruit everybody all at once. So we are looking to build a cohort, not just looking to get 16 individuals."

DISCUSSION AND RECOMMENDATIONS

The satisfaction of the program participants and their employers with the contribution of the programs to professional practice is important to the continuity of professionals' interest in pursuing degrees and certificates in Jewish education. The vast majority of the program participants described a positive influence of the programs on their professional practices. As discussed earlier, referrals by alumni are the most influential recruitment activities to degree and professional development programs. When friends and colleagues see the plethora of new ideas and curriculum innovations that alumni introduce based on their program participation, they may be more convinced that investing in continuing education is worthwhile.

The findings showed that a close connection exists between program design and program impact. The program participants indicated that maintaining academic rigor and providing practical tools for implementation were critical for their retention and satisfaction. Researchers have suggested that a higher level of knowledge transfer, including courses at higher education institutions, teaches professionals how to embed theory- and research-based knowledge into professional activities, such as staff supervision, the development of new organizational structures, building relationships with communities, and enhancing instructional programs (Gamble & Blackwell, 2001; Horvath, 2000). McDermott (1998) argued that "the art of professional practice is to turn information into solutions" (p. 3). Professionals need to be able to piece information together, reflect on their experiences, generate insights, and use those insights to solve problems. However, combining program design elements is not a straightforward task. For example, based on program goals and an understanding of the prospective market, program directors need to strike the right balance between individualizing learning plans that match the learning goals of participants and building a cohort experience while exposing professionals to a wide range of perspectives and expertise.

AIR's recommendations for program development are as follows:

- **Offer customized learning plans for competencies tied to professional careers.** The program participants valued choice of courses and lectures and applied knowledge that was relevant to their workplaces and career trajectories. Higher education institutions can leverage their multiple schools, departments, and centers as well as collaborations with other institutions to present a rich menu of electives. The Jewish education field is rapidly evolving to include more types of immersive, experiential education programs than ever before, such as museum education,

art and dance studios, service learning, and programs for engaging recently married couples and families in a local Jewish community. Interdisciplinary programs and interinstitutional collaboration have the potential of providing a wide range of coursework to meet the different learning goals of the participants.

- **Identify barriers to program impact in specified areas.** According to reports from both participants and their employers, the programs influenced less than one half of the program participants in three particular areas: (1) Israel education, (2) the use of education technology in the classroom and for online/blended learning, and (3) data-driven decision making. The program participants reported that they did not have opportunities in their workplaces to apply knowledge and skills in these areas. Some participants also noted that their programs did not provide sufficient learning opportunities within these areas (e.g., only one course or seminar was available in a given area and had no follow-up). Webinars, short professional development courses, and the expansion of elective course options may help provide more access to learning within these areas of specialization.

Effects on Career Pathways

INTRODUCTION

This section of the report addresses the third research question: How has the Education Initiative affected the career advancement of the program participants?

The use of multiple measures of workforce outcomes is important for examining the association between advanced degrees and professional development and career pathways. Advanced degree and professional development programs can affect the career pathways of professionals in multiple ways. Educational attainment can lead to increases in job responsibility, job promotions, and salary (Croteau, 2010). Researchers suggested that these programs also can help professionals change their career aims. For example, academic programs may help students develop a "leadership identity"—self-confidence in one's ability to become a leader and an interest in a lifelong process of learning and exploration of leadership knowledge and skills (Ganio, 2011; Henderson & Chetkovich, 2014).

Researchers have suggested that a master's degree improves the employment outcomes of education professionals. A study conducted by Foster (2013) showed that educators with a master's degree are more likely than educators with only a bachelor's degree to be offered full-time jobs and have higher starting salaries. Other studies reported that obtaining a master's degree or a doctoral degree promotes lifetime earnings and an increased quality of life across a variety of occupations (English & Umbach, 2016). Advanced degree and professional development programs are beneficial to both early career and veteran professionals. For professionals with multiple years of job experience (the majority of the beneficiaries of the Education Initiative), the combination of rigorous coursework and work experience may yield a greater return on investment (Ng & Feldman, 2009).

FINDINGS

The Education Initiative contributed to a significant number of career advancements and job promotions. We defined career advancement as moving up the career ladder (e.g., from teacher to division head in a Jewish day school), an increase in work status (e.g., from no employment or a part-time job to a full-time job), and movement from a smaller to a larger organization (e.g., from the director of education in a small congregation to the director of education in a large congregation). We estimate that nearly one half of the master's programs graduate students (308 individuals) have already advanced in their careers. Because most of the students have only recently graduated, follow-up is needed to more fully capture the extent of career advancements several years after graduation.

Participants changed job positions, job settings, and geographical locations. As shown in Exhibit 6, only 55 percent of the participants did not change their jobs postenrollment. About 31 percent of the participants transitioned to new jobs within the same type of Jewish education settings. For example, professionals working in congregational settings accepted new employment positions either within the same congregation or a different congregation. The remaining 14 percent transitioned to jobs in types of settings that they have not worked in before. For example, professionals with experience working in Jewish day schools and congregations accepted a job position in another type of a nonprofit organization. In addition, more than one third (36 percent) of the participants relocated to a different state in the United States after program enrollment.

Exhibit 6. Job Change Profiles

Job Change, Different Setting 14%

Job Change, Same Setting 31%

No Job Change 55%
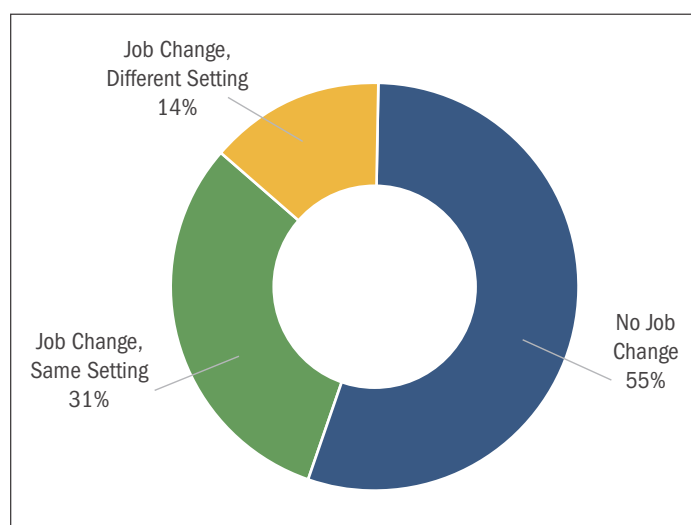
Participants are likely to have significant returns on education in terms of salary. AIR used employment records before and after program participation, including job title, organization name, and geographical location. Salary information was obtained through alumni reports and publicly available databases of median wages by job position and by state. Additional data included demographic characteristics (e.g., age and gender) and program characteristics (e.g., tuition during the years of enrollment; the number of years the student was enrolled; part-time versus full-time enrollment; online, blended, or on-campus coursework). The information here is reported for 576 individuals, for whom AIR gathered complete information. On average, graduate students had 29 years left prior to retirement. The return on investment was the difference between lifetime net income based on salary before program participation and lifetime net income based on salary after completing a program. The cost of program tuition had the student paid the full published tuition amount and the cost of reduced income during the time of study were deducted from the lifetime net income that is based on a person's salary after program completion. Even after factoring in the costs that students incur when earning their degrees (e.g., lost income and tuition), the increase in average lifetime earnings of participants between program completion and retirement was $348,045. By comparing this amount to estimated lifetime earnings based on the most recent preenrollment annual income, this return represents a net average income increase of $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, JCCs, and innovative Jewish educational settings ($457,981); these professionals increased their average salaries from $48,390 to $61,904. Professionals who worked in congregations after program completion gained a relatively high return on investment in their education ($383,283) and increased their average salaries from $60,089 to $73,044. Professionals who work in Jewish day schools gained the least ($183,061); their average salaries increased from $53,018 to $60,403. The return on investment was similar for female and male professionals ($354,809 and $353,028, respectively). These findings demonstrate that a master's degree pays off, even after taking into account the cost of earning that degree.

The Education Initiative supported the advancement of professionals to educational leadership positions. One third of the program participants (33 percent) in advanced degree programs moved from nonmanagerial roles (e.g., teacher, coordinator, or counselor) to leadership positions (e.g., director or division head) after graduation. In addition, 9 percent of the professional development program participants advanced to educational leadership positions. Among the advanced degree program participants, more female than male graduate students (100 and 69 individuals, respectively) transitioned to educational leadership positions. Most of the female professionals (95 percent) who were promoted to leadership roles enrolled in HUC-JIR and JTS. Among the professional development participants, the number of female and male professionals advancing to leadership roles was about the same (32 and 36 individuals, respectively). The percentage of advanced degree participants who entered educational leadership roles while enrolled or after program completion was larger in the Southeast, the West, and the Midwest than in the Northeast and the Southwest, presumably caused by growth in Jewish education programs and a need for professionals trained for leadership roles (Exhibit 7).

Exhibit 7. Percentage of Advanced Degree Participants Who Transitioned to Educational Leadership Positions
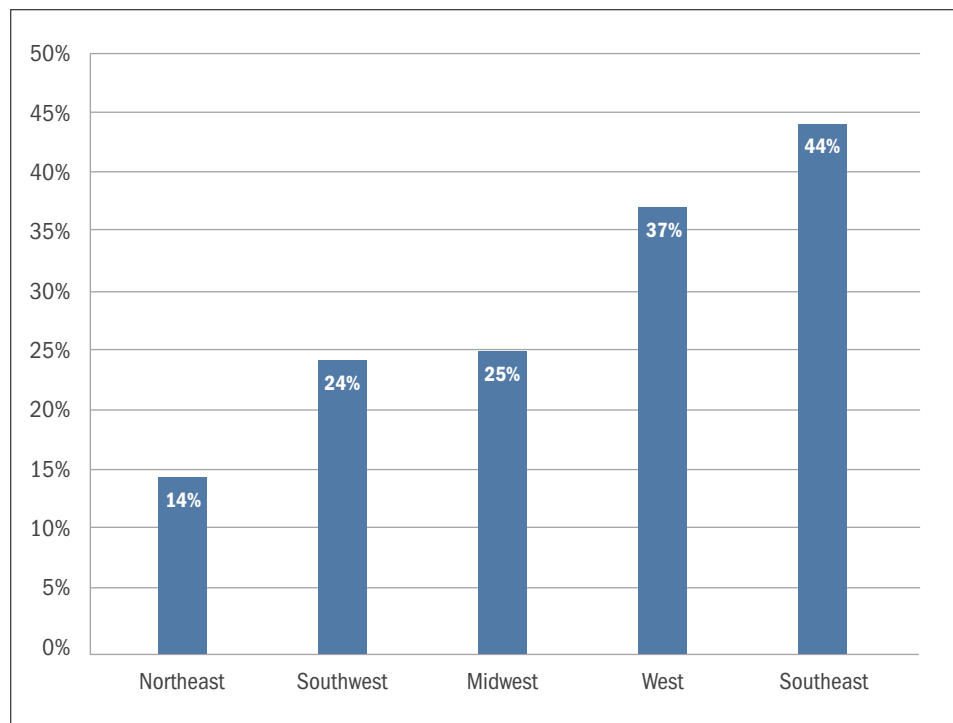
The degree and professional development programs also increased professional self-esteem and a sense of readiness for leadership positions. The program participants reported a change in their readiness to pursue leadership positions. Most of the degree and professional development program participants (68 percent and 79 percent, respectively) reported long-term career aspirations to serve as educational leaders in the field (e.g., directors, executive directors, heads of schools, or owners of educational start-up businesses). Among the specific program effects that alumni reported are the following:

- Feeling ready to accept job offers for more senior management positions
- Feeling motivated to explore leadership positions in other Jewish education settings
- Having the content knowledge to facilitate staff retreats on a variety of topics, including social and emotional learning, spiritual development, EJE, visioning, professional learning communities, shared leadership, and Israel engagement
- Being able to examine from a fresh perspective organizational effectiveness and efficiency
- Being able to articulate to staff and the larger community the values, ideology, theory, and research that support the educational vision of the school or organization

The program participants expressed interest in continued leadership education to deepen their understanding of the broad sense of leadership (e.g., through studying leadership frameworks) and specific leadership skills that are relevant to their existing or new job positions. In most cases, the program participants who transitioned to leadership positions moved to a new workplace. They described multiple reasons for their job moves, including not being able to pursue a promotion in their current workplaces and a desire for new challenges. The following two quotations demonstrate this point:

> I think this is important to note: In my institution, upon completion of the master's degree, I was not given any increase at all. I think that's really important to note. The institution itself felt that they had given in-kind, by allowing me to travel and to use some paid time for attending classes. They supplemented a little bit, like maybe a $1,000 a year. Through the job change, my increase—and I would say a lot of that increase has been because of the master's degree—was about $30,000.

> Part of why I ended up leaving the institution I was working at was because I entered the master's program as one person and I left as another. My former workplace was not ready to grow with me. The education and knowledge that I learned in the master's program made me realize that what we were doing could be [done] better, and I really wanted and needed to do more for the families that were there.

Induction programs supported both new professionals and their employers. Under the Education Initiative, YU and HUC-JIR designed, piloted, and refined induction programs. HUC-JIR's Induction and Retention Initiative included 64 graduates of the master's in Jewish education and master's in religious education programs who graduated between 2012 and 2016. Most of these graduates also received tuition scholarships under the Education Initiative. The Induction and Retention Initiative was designed as a menu of services, including in-person seminars, webinars, mentoring, and online downloadable tools. Participants who benefitted the most from the program were those who had no access to mentors otherwise, whose schedule permitted travel to the in-person seminars, and who were in need of job placement support or were struggling in the first months in their new jobs. According to employers' reports, the induction of new hires is a valued support to first-time directors because it enabled them to meet job expectations and made it possible for senior management to delegate responsibilities and better fulfill their own job responsibilities. According to Deborah Niederman, the coordinator of career services for the HUC-JIR Schools of Education, the program has been equally focused on technical skills and emotional support:

I think that our professors do a great job of really empowering alumni and making them feel enthusiastic and excited about the challenge of changing the world. But challenges within the first 100 days in a new job can be a very alienating experience for a new professional. Once you make that first mistake, you have a real emotional need that sometimes your supervisors simply can't fulfill. First of all, because they are your supervisors. So, they are not only invested in your success, but they are invested in [the] success of the institution. To know that the College [HUC-JIR] can be here to help you reflect through the process and grow from it and that you have the support of fellow alumni who have experienced the same thing is very powerful.

The Education Initiative enabled the implementation of YU School Partnership's New Teacher Induction Program (NTIP). Under the Education Initiative, this program served 20 schools across the United States. The three-year program was designed to support new teachers and teachers who were struggling through mentoring and the introduction to effective pedagogical practices. YU staff trained experienced teachers to become mentors. Interviews with school principals revealed that mentoring improved the performance of their new hires. Indirectly, because of the accelerated integration of new hires in the school environment, these programs enabled school leaders to pursue program improvement initiatives.

DISCUSSION AND RECOMMENDATIONS

In Jewish education, as in general education, the traditional and still dominant path to career advancement is higher education. HUC-JIR, JTS, and YU implemented programs that are rich in content; are delivered by nationally recognized experts; and include student supports, such as mentoring. Input from the program participants and their employers showed that the Education Initiative contributed to professional learning and improved professional performance. This report suggests that having a view of education anchored in theory and research will not only be attractive to employers but—where professionals are empowered to make programmatic and organizational changes—also might contribute to the quality of local and national educational programs.

The Education Initiative helped educators and educational leaders advance their careers and earnings potential. Professionals who enrolled in the master's degree programs supported by the Education Initiative were more likely than prospective students who inquired but did not apply to advance in their careers between the time of enrollment and the final year of the initiative (45 percent and 30 percent, respectively). Based on preliminary data from the HUC-JIR and YU induction programs, professionals who received job transition supports and at least one year of mentoring tended to receive positive performance reviews from their employers. The net income return on investment of participating in a master's degree was substantial, although it varied by the various Jewish education settings.

AIR's recommendations related to career pathways are as follows:

- **Establish strong partnerships with employers to ensure maximum benefits of employees' professional learning.** The alignment of academic content to workplace activities often is challenging for institutions of higher education because of a lack of professional development standards (Choy & Delahaye, 2011). A partnership between the three institutions and Jewish

education providers can infuse academic learning with practice opportunities as well as students' translation of evidence-based pedagogical practices into effective implementation plans appropriate for particular sociocultural environments.

- **Continue to offer leadership development opportunities.** Although several programs developed under the Education Initiative had explicit leadership development goals (e.g., HUC-JIR's Executive Master's Program, JTS's Jewish Experiential Leadership Institute [JELI], and HUC-JIR/ JTS's Jewish Early Childhood Education Leadership Institute [JECELI]), the participants of other programs also desired to develop their leadership skills. The three grantees are well positioned to continue the development of emerging leaders in Jewish education. A meta-analysis of the effects of the leadership training programs revealed that academic programs that teach about educational theory are well suited for leadership training because they help students understand why the leadership practices taught can be effective (Collins & Holton, 2004). In addition, professionals value programs that focus on skills such as collaboration, teamwork, critical thinking, and managerial techniques (Jenkins & Cutchens, 2011; Maki & Borkowski, 2006). In addition, given that little is known about what knowledge and skills or processes in managerial leadership are needed for specified positions and settings in Jewish education, investments in identifying standards for leadership development can strengthen leadership programs.

Capacity Building and Financial Sustainability for Advanced Degree and Certificate Programs

INTRODUCTION

This section of the report addresses the fourth research question: What lessons were learned about the support systems, structures, and processes that promote institutional capacity and program financial sustainability?

Institutional capacity building was an important part of the Education Initiative. The grantees reorganized and improved their management and marketing. One fourth of the funds were applied toward marketing and enrollment management, technology infrastructure, and administration. The grantees hired new faculty members and adjunct personnel, revised their websites, and identified best practices for publicizing their new academic programs. Also, each institution allocated $1 million to collaborative ventures, including knowledge sharing, program development, and the joint alumni network.

The Education Initiative required that the grantees identify means for financially sustaining the programs found as most successful in attracting and impacting participants. Financial sustainability refers to the ability of an educational institution to ensure the continuity of its programs and weather economic uncertainties that may occur (Bowman, 2011; DeBellis, 2012). Financial sustainability planning is a critical aspect of program development. As institutions design and pilot new programs, they also must identify sources of revenue (e.g., from the institution's core budget, philanthropy, and student tuition) to cover the operating costs of academic programs (Sontag-Padilla, Staplefoote, & Morganti, 2012).

FINDINGS

The Education Initiative enabled the grantees to improve their enrollment management strategies. With support from private consultants, 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. Across programs and grantees, the average number of inquiries increased by 39 percent between 2013–14 and 2015–16. This increase in the number of inquiries was caused by improved marketing efforts, including website makeovers, improved tracking databases for prospective students, and large-scale marketing efforts. Although it significantly increased the number of inquiries, large-scale recruitment (e.g., using Google Ads) had little effect on the number of applicants and matriculating students. High-touch strategies through employers, mentors, and colleagues were the most effective recruitment strategies. Alumni involvement in recruitment was particularly important. Across the years of the Education Initiative, the number of applications for admission did not increase at the same rate as the number of inquiries. The number of applications

increased only slightly, leading to a reduction of 10 percent in the average conversion rate (the inquiry-to- applicant ratio) during the final three years of the initiative. For many programs, the recruitment process effectively communicated to students about the nature and requirements of each program. Most of the applicants (annual average of 63 percent) were admitted based on the screening of applications, and nearly all students who were admitted also enrolled.

The Education Initiative sparked comprehensive improvements in educational technology, especially in faculty support systems. Nearly all the new programs developed under the Education Initiative had an online learning component. To enable this new modality for instruction, the grantees invested in infrastructure and systems of support through technology specialists. One of the key lessons learned was the importance of supporting faculty members in designing and delivering online courses. The eLearning Collaborative—a set of professional development opportunities funded by the Education Initiative—partly achieved this goal, by acquainting faculty members with strategies for selecting and using applications for instruction. A faculty member in one of the grantee institutions described some of the challenges faced by online course instructors:

> When you are teaching [an] in-house course, your hours are predictable, and if it is a course you taught prior, you don't need to develop new materials. Online courses are less predictable. If you posted [an] interactive assignment, you need to go online each night for an hour to keep track [of] who is doing what. I don't see online students on [a] regular basis, so I am not sure they get it. I have to make sure every single person logs in and keeps track of [the] class. In our small cohorts, online learning is sensitive to people who do not cooperate in small-group work. There are always students waiting for other people to get back to them. It is also much harder to keep online students' satisfaction high. I need to work harder to keep their buy-in while communicating that they need to think more deeply.

Students consistently communicated (in both AIR surveys and grantee surveys) the need to meet with other students face to face. The grantees concluded that blended instruction—such as supplementing online learning environments with in-person seminars—overcomes the limitations of online instruction. At the same time, some of the online programs, such as the asynchronous distance-learning courses developed by YU, also are a promising model for attracting geographically remote students and busy professionals.

The grantees developed financial sustainability plans for all programs launched under the Education Initiative and continued to use and refine these plans in the later years of the initiative. The grantees expanded or revised processes for reviewing costs and program revenues and examined alternative program implementation plans that may better support long-term financial sustainability. One program director noted the following:

> The process [of creating financial sustainability plans] was good because it was in-depth, and we were not basing it on gut; we were basing [it] on fact. It has allowed us to decide what we would continue to do and what we wouldn't continue to do. It also allowed us to figure [out] how much we needed to charge for things and to figure out what there was really a market for, and what there wasn't based on previous experience. In all of those areas, it was helpful. It is a funny thing because grants are amazing and change everything. Then, sometimes, when they are over, you could moan and say, "We don't have that money anymore; what are we going to do?" Or you could say, "This is our chance to take it to the next level. What does that actually mean?" I think that's going to happen at the end of this

year again, regardless of the fact that we might not have to do it [for the Education Initiative], we have to do it for ourselves.

Box 1 defines the purpose and components of a financial sustainability plan at the program level. All the grantees submitted to the Jim Joseph Foundation written plans for sustaining the new programs identified under the Education Initiative.

Box 1. Financial Sustainability Plan

Planning for the financial sustainability of programs initially funded by external sources is an important step in the life cycle of any initiative. Funders rarely intend to continue full, long-term support of initiatives; they assume that the grantees will take over primary responsibility for sustaining such projects with their own resources and with funding from other philanthropic sources. Effective financial sustainability planning can support decision making relative to resource allocation and program continuity and contribute to transparency in fiscal management.

The key elements of financial sustainability plans at the program level are as follows:

- A clear and compelling vision (e.g., What need does the program address? What is the market interest? What is the feedback of participants in the program?)
- A strategic approach to fund development (e.g., a plan and timeline for fundraising, institutional commitment for program support, and a diverse portfolio of funding sources)
- An enrollment management plan (e.g., a marketing and recruitment plan and a direct link of enrollment goals and financial assistance policy to break even in terms of program cost and revenue)

Financial sustainability depends on donors who can sponsor scholarships to eligible professionals. As part of the technical assistance provided to the grantees, an Excel-based, break-even analysis tool was made available. This break-even analysis aimed to identify the circumstances in which costs and revenues were balanced (Box 2). Below the break-even point (i.e., the point where profit equals zero), the program incurs losses. Above this point, the program makes a profit.

Box 2. Break-Even Analysis

Break-even analyses aim to identify the circumstances in which costs and revenues are balanced. Below the break-even point (i.e., the balance point where profit equals zero), the program incurs losses. Above this point, the program makes a profit. Exhibit 8 is a hypothetical example in which the break-even point is 25 participants and revenue of $300,000.

Exhibit 8. Profit Versus Loss: A Break-Even Analysis
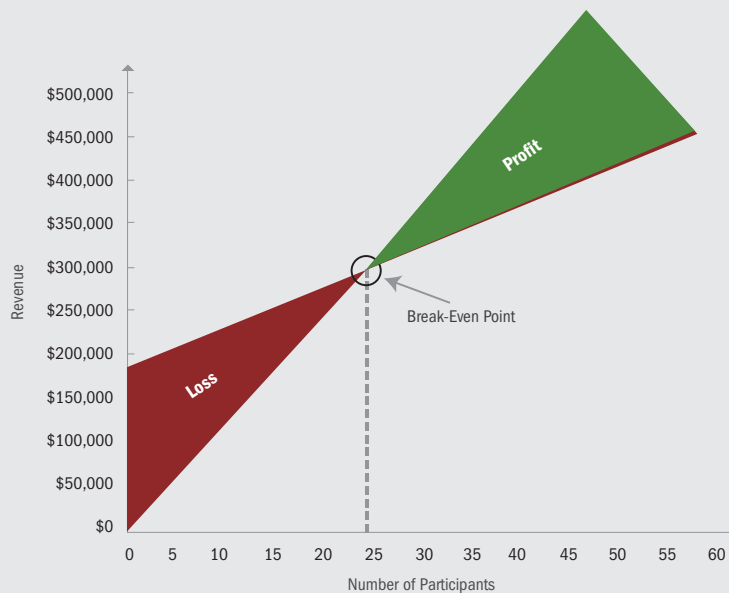
Program directors can use break-even analysis for different purposes, including the following:

- Identify all resources required to implement a program, including personnel, facilities, equipment, and materials, whether paid for directly or contributed in-kind, to ascertain total program costs.
- Explore ways to reduce costs and increase revenues.
- Demonstrate to funders why their help is needed.

A detailed budget is a prerequisite for accurate calculations. It is important to gather information about all associated costs at the most detailed level possible. Two types of costs should be included in a break-even analysis: fixed costs and variable costs. Fixed costs are program-related costs paid by an institution, regardless of how many students are enrolled in a program (e.g., salaries for program directors and marketing). Variable costs change as a function of the number of students enrolled (e.g., stipends and materials). Finally, all revenue sources (e.g., tuition, fees, and fundraising) should be included in the analysis.

The break-even analysis results are calculated as follows:

$$\text{Direct Revenue} - \text{Variable Costs} - \text{Fixed Costs} = \text{Profit}$$

When profit is a positive number, or when direct revenue exceeds variable costs plus fixed costs, an institution makes money on a program. When profit is a negative number, a program is not recovering its costs, which must be supplemented elsewhere. A negative amount also indicates what is required for a program to break even.

Another indicator of the value of increasing enrollment targets is the contribution margin, which is calculated by the following formula:

$$\text{Revenue} - \text{Variable Costs} = \text{Contribution Margin}$$

The contribution margin shows how much profit is generated from each additional program participant. As the contribution margin increases, it becomes more beneficial to find ways to increase program enrollment.

Despite findings showing that programs would benefit from increasing the number of participants, the break-even analysis did not influence the enrollment goals of the grantees. However, the break-even analysis influenced program structures. The grantees increased the number of adjunct staff to contain labor and other direct costs. In addition, the break-even analysis influenced decisions to replace full-tuition waiver policies with varying degrees of scholarships, which covered up to 75 percent of the tuition. Generally, the grantees assumed that tuition and fees could recover only one third of the program operating costs; therefore, increased efforts for fundraising were necessary.

Pricing sensitivity analysis based on survey data showed that most students are not willing or able to pay the current full tuition price, but they are willing to pay a reduced amount. Box 3 describes the analysis conducted. Based on survey responses, the annual dollar amounts that part-time master's degree students are willing to pay range from $5,250 to $10,250, and the optimal price point is about $7,500. The program participants reported that they used public institution tuition rates as a reference point for determining what amount they would be willing to pay. The optimal price point was not associated with gender, geographic region of residence, employment setting, and age at the time of enrollment. However, being in a leadership position prior to enrollment was a significant predictor. Students who were already in leadership or management positions prior to enrollment were willing to pay $4,000 less in annual tuition for a master's degree than individuals who were early in their career and not in management positions. Early career program participants noted that they needed the master's degree to get access to the jobs they wanted. Program participants who were already in leadership positions were interested in pursuing an additional degree for their professional growth but were less willing to pay for it.

Box 3. Pricing Sensitivity Analysis

Using the Price Sensitivity Meter method that was developed by Van Westendorp (1976), the AIR survey included the following question:

> If no financial assistance were available this year, what tuition amount would be
>
> 1. Too low, given the value?
>
> 2. A bargain—a great buy for the money?
>
> 3. Almost too high but still within an affordable range?
>
> 4. Too high and passes into an unaffordable range?

The participants responded to each question using a drop-down menu with a range of prices from $0 to $30,000 for advanced degrees and $0 to $10,000 for professional development programs. The responses to these questions were plotted on a graph (Exhibit 9). The vertical axis is the cumulative percentage of respondents; price points are on the horizontal axis. In Exhibit 9, which represents the responses of 340 part-time master's degree students from the three grantees, the "too low" and "unaffordable" lines intersect at $7,500, which is known as the optimal price point. The cumulative percentage was 22 percent at the optimal price point, meaning that 78 percent of the survey respondents considered the tuition price of $7,500 neither too expensive nor too cheap, relative to their ability to pay. Data on prospective students' pricing sensitivity in conjunction with data on other factors that influence enrollment decisions can help institutions make decisions regarding lowering or raising tuition "sticker" prices, financial assistance policies, and fundraising goals (DesJardins & Bell, 2006).

Exhibit 9. What Is the Optimal Price Point?
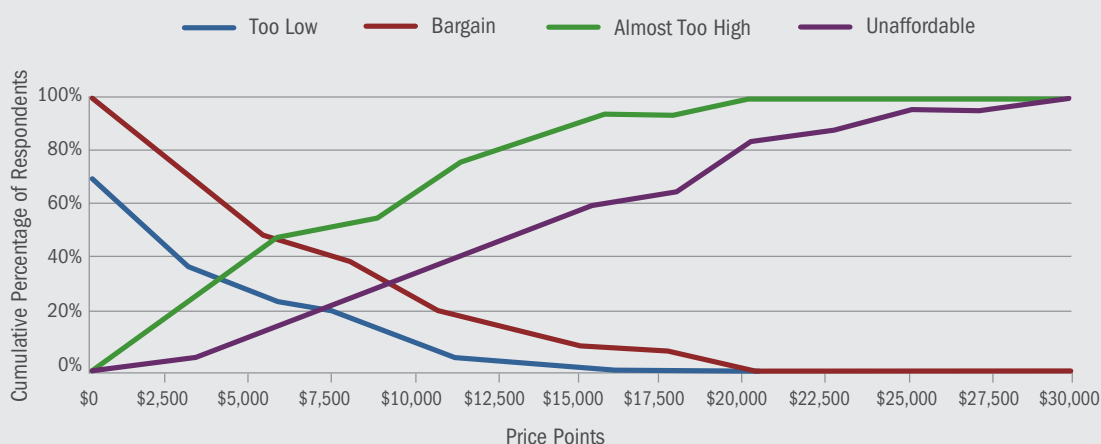
Exhibit 9 shows how the optimal price point (at the intersection of the too low and unaffordable lines) is determined.

DISCUSSION AND RECOMMENDATIONS

Private universities across the United States are grappling with the same issues as those faced by the grantees of the Education Initiative. These institutions are redoubling efforts to reduce program operating costs and identify new programs and program delivery formats that are responsive to the marketplace, and they are committed to continual instructional improvement. The need to reduce program costs stems from the low likelihood that only tuition and fees can sustain programs. According to a recent survey, tuition discounting by private higher education institutions reached an all-time high in 2014, with discount offers of nearly 50 percent of published tuition (National Association of College and University Business Officers, 2014). Financial sustainability also is contingent on successful marketing and recruitment. When the number of qualified applicants exceeds the number of available seats, the use of scholarships may be reduced (Baum & Lapovsky, 2006). However, as is the case for other private higher education institutions in the United States, high-quality products that appeal to philanthropists are an important part of financial sustainability. All the grantees are still identifying fundraising approaches that will attract the interest of donors while fulfilling the mission of each institution.

AIR's recommendations for capacity building and financial sustainability are as follows:

- **Form collaborative relationships to save on program development and operating costs.** Collaborative relationships with other higher education institutions can enable the combination of existing programs into newly packaged programs that will attract larger audiences. In addition, professional development and degree programs can use materials developed by practitioners in day schools, congregations, and community-based organizations. Some of the new programs launched under the Education Initiative, such as JELI and HUC-JIR's residential and executive master's programs, have successfully integrated practitioners as mentors and guest speakers. This approach was regarded as successful because it deepened the practical value of seminars and enabled participants to immediately apply their newly acquired skills for problem solving and decision making at their workplaces.

- **Provide mentoring and assistance to online course instructors.** Continuing to explore solutions to reduce the workload of online course instructors may result in better program quality as well as staff job satisfaction.

- **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.** The interest expressed by students in individualized learning plans and the substantial number of students working in educational settings that offer immersive Jewish educational experiences (e.g., programs that include visual and performing arts, service learning, and trips to Israel) suggests a need for training that promotes the ability to invent and innovate in Jewish education settings.

Interinstitutional Collaboration

INTRODUCTION

This section of the report addresses the fifth research question: To what extent has the Education Initiative promoted interinstitutional collaboration among the three grantees?

Interinstitutional collaboration has become increasingly common in higher education. It is a promising strategy for maintaining an advantage in a competitive market and providing quality education (Burley, Gnam, Newman, Straker, & Babies, 2012; Dotolo & Noftsinger, 2002; Forcier, 2011; Mattessich, Murray-Close, & Monsey, 2001). The combined resources of institutions can enable projects that each organization alone cannot achieve, especially if the partnering organizations offer different or complementary contributions (Kim & Parkhe, 2009). The work of higher education consortia in the United States (e.g., Associated Colleges of the Midwest and the Claremont Colleges) and the scholarly work of the Big Ten Academic Alliance (formerly, the Council on Institutional Cooperation) and the Association for Collaborative Leadership have produced case studies that attest to the potential benefits of interinstitutional collaboration in higher education. Collaborating institutions can achieve greater breadth and depth in particular subjects and improve the quality of teaching. In addition, through collaboration, small higher education institutions can build a critical mass of scholars and be more cost effective in their use of human capital and material resources (Moran & Rumble, 2004).

To encourage collaboration among the grantees, the Education Initiative earmarked $1 million per grantee to identify and develop collaborative activities. In addition, the Jim Joseph Foundation organized two annual learning events that were attended by representatives from HUC-JIR, JTS, and YU, including all three college presidents, deans, directors, and faculty members. During these events, the grantees made presentations about the development of new programs and marketing and recruitment strategies; they also exchanged ideas for addressing common challenges. Thus, the Education Initiative led to new levels of collaboration among the grantees.

FINDINGS

T**he Education Initiative led to unprecedented collaboration among the three institutions.** In Year 1 of the grant, presidents, deans, and program directors communicated often to explore possibilities. During Years 2–6 of the grant, four joint initiatives were launched under the Education Initiative:

- **eLFF (Box 4),** a shared professional development program aimed at promoting the use of educational technology to improve student experiences in the classroom and expand distance-learning opportunities. Through face-to-face sessions and online meetings, two cohorts of faculty members from HUC-JIR, JTS, and YU learned how to select and use educational technology applications for on-campus, online, and blended courses. The Columbia Center for New Media Teaching and Learning delivered the programs, and a committee of representatives of all three grantees planned and monitored implementation.

- **Conceptualizing EJE (Box 5),** an effort to professionalize practices, processes, and structures in the EJE field, with professionalization conceptualized as basing activities on frameworks, theory, and research. By articulating key principles, the grantees sought to enable higher quality

training programs as well as systematic activities, including research and monitoring of the quality of practice. The grantees collaborated formally (e.g., conferences) and informally (e.g., observing each other's programs) to expand their understanding and articulation of essential EJE elements.

- **The EJE Network (Box 6),** a professional learning community that provides face-to-face sessions and online learning events to the alumni of four programs developed under the Education Initiative. With the help of an independent coordinator and an alumni advisory group, a joint steering committee composed of representatives from each institution oversees the Network on an ongoing basis. The Network offers continued education as well as platforms for knowledge sharing.

- **JECELI (Box 7).** JTS and HUC-JIR, in collaboration with Bank Street College, delivered a professional development program for new and aspiring early childhood education center directors. This unique program combines three fields: early childhood education, Jewish studies, and leadership development.

Box 4. The eLearning Faculty Fellowship

Goals

eLFF is a faculty professional development program that aims to expand and deepen the use of technology by faculty members to provide higher quality instruction in both the classroom and online. The Columbia Center for New Media Teaching and Learning and a committee composed of representatives from HUC-JIR, JTS, and YU planned the eLFF sessions. Each session focused on examining applications that may be used in both on-campus teaching and online courses.

The interinstitutional eLearning Collaborative Leadership Team was the first formal collaborative structure that involved all three grantees. The team was tasked with designing the content, structure, and operation of the program while ensuring that all decisions made represented the views of the leadership of each organization and served the needs of faculty members in all three institutions.

Rationale

Higher education is moving toward the greater use of technology in both the classroom and online learning. Many instructors are willing to try new technology, but they might be overwhelmed by numerous technological advancements, applications, and processes (e.g., Web- and computer-based learning, virtual classrooms, and digital collaboration) used in instruction (Mason & Rennie, 2006; Njenga & Fourie, 2008). During the next few years, new generations of technology tools will revolutionize instructional practices in higher education (Johnson et al., 2013). As a result, faculty members will assume the role of lifelong technology learners (Kukulska-Hulme, 2012). For these reasons, HUC-JIR, JTS, and YU have identified technology in instruction as a common thread on which the three institutions can collaborate, with the goal of promoting the knowledge and skills of faculty members.

Inclusion Criteria

Two cohorts of 18 fellows were evenly distributed across the three institutions. Faculty from the schools of education participating in the eLFF program—mostly self-selected, although a few were nominated—sought exposure to educational technologies that they felt could help them become more effective instructors.

Program Components

Because the faculty members had varying levels of prior exposure to educational technology, the eLFF program allowed them to explore and experiment with their teaching methods based on the professional development goals they set for themselves. The yearlong program included monthly in-person workshops and online asynchronous learning. As part of their online learning, the faculty participants watched videos, posted completed assignments, and responded to each other's posts in online discussion boards. They were requested to work in pairs—preferably with a partner from another institution—on some of their assignments. Each faculty member also designed and implemented a project that aimed to use at least one of the new technology applications learned to address a challenge or identified student needs in one of their courses.

The approach that informed these sessions is the Substitution, Augmentation, Modification, and Redefinition model (Puentedura, n.d.). This model explains a progression of technology integration that moves from replicating traditional instruction using technology tools to innovative instructional methods. A success indicator is the extent to which the fellows felt inspired to introduce new learning experiences by using technology. The program culminated in a final showcase and symposium that was held in New York City. In each cohort, eLFF participants made presentations about their projects in a final showcase event that was jointly organized by the three grantees.

Box 5. Conceptualizing Experiential Jewish Education

Goals

The grantees sought to grow institutional capacity for offering EJE programs to educators, educational leaders, and emerging academic scholars. The need to develop educators' knowledge and skills relative to EJE is based on two premises:

- Experience (both behavioral, through participation in trips, museum education programs, social events, games, and work, and cognitive, through reflection and the re-creation of memories) has a central role in promoting Jewish individuals' interest and participation in the Jewish community as well as Jewish learning and practice (Lough & Thomas, 2014; Romi & Lev, 2007; Sorkin, 2009).
- Experience can promote intrinsic motivation for learning as well as better comprehension and retention of the content learned (Shernoff, Abdi, Anderson, & Csikszentmihalyi, 2014).

The proliferation of experience-based programs for teens and young adults (e.g., trips to Israel, camps, and community service) and increased understanding of the potential impact of such programs on Jewish engagement created a demand for well-trained educators who build programs based on proven best practices rather than trial and error.

Accomplishments

The development of programs under the Education Initiative has sparked important debates among the three grantees on the nature of EJE, such as whether EJE should be defined as an independent paradigm of philosophy (as argued by Taylor [2014]) or a pedagogical methodology (as argued by Young [2014]).

The grantees explored the extent to which important Jewish organizations, such as BBYO, Camp Ramah, and Hillel, followed what experts believe to be important EJE practices, such as setting goals and measuring progress toward accomplishing these goals (Cousins, 2013). The data showed great variations in the extent to which these practices were in place, emphasizing the importance of the programs developed under the Education Initiative. The program participants, who were professionals in a variety of educational settings, reported that they received the knowledge and tools to implement a model of EJE that emphasizes the articulation of learning goals and the intentional use of program activities to reach these goals. The program participants reported that they have gained an important understanding of a new paradigm, which led them to discontinue activities that have been in place for years because they were not aligned with the program vision and goals and redesign programs in a more focused way.

EJE conceptualization led to new program development. For example, in 2016, HUC-JIR announced a new concentration in EJE as part of the master's in religious education and master's in Jewish education programs, and JTS, in collaboration with the Pardes Institute of Jewish Studies, announced the experiential educators master's program for experiential educators who want to live and study in Israel.

Box 6. The Experiential Jewish Education Network

Goals

The EJE Network was established to promote knowledge sharing and innovative learning opportunities. The network's goals were as follows:

- Provide alumni with continuing education opportunities in the EJE field.
- Provide alumni with resources that support the translation of theory into practice.
- Promote communication (e.g., online conversations and face-to-face meetings) among alumni of the three grantees.
- Increase alumni employment opportunities among both job seekers and those striving to lead new EJE projects at their workplaces.
- Increase collaboration across Jewish educational organizations in the field.

Research-Based Practices

Research has suggested that alumni outreach and university extension programs are important for translating the academic knowledge typically delivered as part of degree and certificate programs into the local community and organizational context in which professionals work. Learning events and written resources can provide professionals with the information they need when they transition into new roles in community organizations or plan new initiatives (Green & Haines, 2015; Lachapelle & Clark, 2011). Because the EJE field has grown out of both academic fields (e.g., neuroscience and cognitive science; Taylor, 2014) and the experimentation of practitioners in multiple settings and with multiple age groups (Goldwater, 2014), the EJE Network combined academic lectures from speakers representing HUC-JIR, JTS, and YU with workshops and discussions led by alumni who work as experiential educators.

Inclusion Criteria

The single prerequisite for inclusion in this interinstitutional alumni network is a basic understanding of EJE theoretical models. To be eligible for inclusion in the network, an individual must have completed one of the following programs:

- The EJE program at YU
- The Certificate in Jewish Education Specializing in Adolescents and Emerging Adults program at HUC-JIR
- The JELI program at JTS
- A master's degree in Jewish education from JTS

Program Components

Network services to alumni are provided across a three-year period, and more than 200 professionals are expected to receive these services. To date, the EJE Network has hosted a three-day, in-person retreat in Atlanta, Georgia. Attended by 45 alumni, this retreat provided workshops facilitated by recognized experts in Jewish education and members of the alumni network. The retreat was structured as a consecutive series of sessions that led participants through a sequence of learning, understanding, and discussing instructional practices as well as experiencing different modalities of learning.

The learning events noted here, as well as other focused learning activities provided by the EJE Network, are collaboratively planned by representatives of the three grantees, the network's director, and an alumni advisory group. The planning process is designed to flow in two distinct directions: top down and bottom up. Top-down planning incorporates the views of scholars at all three institutions regarding the content and research base with which experiential Jewish educators must be familiar given the state of the field. Bottom-up planning is based on ongoing feedback from alumni regarding the content and types of learning activities that will be most useful to them.

Each set of workshops within a retreat or a webinar series has an overall theme. For example, the fall 2015 learning event focused on memory. The workshops dealt with topics that related to the effects of personal and collective memories on Jewish identity, memories that Jewish educators should aspire to create, and techniques in designing experience-based memories. The spring 2016 learning event focused on joy. Participants were challenged to craft joy interventions—a component that will boost morale, a positive climate, interest, and excitement among both students and staff. Each learning event theme is further explored through additional network activities, such as book clubs and social media discussions.

Box 7. The Jewish Early Childhood Education Leadership Institute

Goals

JECELI was developed and delivered by JTS and HUC-JIR in collaboration with Bank Street College. This 15-month leadership institute aims to provide the knowledge and skills that Jewish early childhood education directors need to further develop a school's Jewish culture, positive climate, and relationships with the community plus the skills of the entire staff.

Rationale

Jewish early childhood education is a unique opportunity to engage both young children and their parents in Jewish communal life and strengthen their knowledge of Jewish values and rituals (Beck, 2002; Nasatir & Friedman, 2014). However, barriers exist in accomplishing these goals. Standard educational objectives for Jewish early childhood education do not exist (Tal, 2013). Many directors lack the Judaic knowledge needed to provide guidance to staff (Comer & Ben-Avie, 2010; Vogelstein & Kaplan, 2002). Most center directors have been promoted from their prior positions (such as lead teacher) without any preparation for planning and implementing systemic changes in their centers (Talan, Bloom, & Kelton, 2014; Whitebook, Kipnis, Sakai, & Austin, 2012). To address these challenges, JECELI aims to equip new and aspiring directors with the leadership skills and Judaic studies knowledge they need to be successful in their jobs.

Inclusion Criteria

JECELI is designed for professionals who have up to five years of experience in a leadership position in a Jewish early childhood education program or at least three years of relevant teaching experience and interest in assuming a leadership position. The program participants also are expected to have at least a bachelor's degree in early childhood education or a related field; complete at least one course in the area of child development; and have a basic understanding of Jewish learning, such as the cycle of Jewish holidays. Under the Education Initiative, JECELI provided training to 47 participants in three cohorts that drew professionals from across the United States. A fourth cohort was financed by other funders and was open to professionals serving the greater Chicago Jewish community.

Program Components

JECELI includes an introductory in-person orientation, online study, communication with mentors once or twice per month, two weeks of study in New York City for two successive summers, and travel to Israel for a 10-day seminar. Areas of study include Jewish learning, reflective practice in a social context, leadership development, and community building.

JTS and HUC-JIR collaborated on designing in-person seminars and an online curriculum using the Haiku Learning platform. Participants also met virtually using Google Hangouts and formed a Facebook group. To date, nearly all the JECELI graduates still meet regularly in person and online, and they organize their own activities to continue the learning they began in JECELI.

Faculty members who supported intra-institutional collaboration also advocated interinstitutional collaboration. At the time of the Education Initiative, the three grantees were not new to the concept of interinstitutional collaboration. Some schools within the grantee institutions had cooperative agreements with other institutions of higher education. YU had agreements with Columbia University and Stony Brook University in New York; JTS had an agreement with the Teachers College at Columbia University in New York, and HUC-JIR had agreements with the University of Southern California and Washington University in St. Louis, Missouri.

However, the development of interinstitutional collaboration in its deeper sense, involving closer relationships among faculty members and ongoing conversations about knowledge sharing and areas of joint interest, required changing the mind-set and skill sets of the faculty members. To make collaboration productive, effective, and aligned with existing structures, some management processes had to be modified to support collaboration. This change was not solely a top-down process driven by institution leadership. Change also resulted from bottom-up developments of objectives articulated by the program directors.

The grantees noted the similarity in vision, attitudes, knowledge, and skills required for both intra- and interinstitutional collaboration; developing both types of collaboration in parallel as part of the Education Initiative was both challenging and beneficial. To effectively create, launch, and implement the many programs created under the Education Initiative, the grantees reorganized some structures and increased the level of intra-institutional collaboration. YU increased collaboration between the Azrieli Graduate School and other parts of the university, such as the Stern College for Women and the YU School Partnership. HUC-JIR centralized the management of the New York and Los Angeles schools of education and created a new position for a senior national director. For the first time, HUC-JIR launched national programs that enabled the participation of staff from all three U.S. campuses. All these changes involved a culture shift—collaboration rather than competition among the campuses. The shared endeavors commanded more centralized support functions, such as joint efforts related to recruitment and marketing. Both HUC-JIR and JTS used some of the Education Initiative grant to enable the award of master's degrees in Jewish education to rabbinical and cantorial students, thereby strengthening coordination among the schools. In addition, JTS increased its institutionwide commitment toward serving educational and communal Jewish organizations—from day schools to congregations, JCCs, Hillel, and start-ups in Jewish education—which included professional training in general and leadership training in particular.[5] As commented by JTS Chancellor Arnold Eisen:

> It is quite remarkable. The school is more dynamic and open, and there is more energy now—if you can measure institutional energy—compared to 2008. The Jim Joseph Foundation has enabled that and it left its mark on the institution. I think that JTS is a better place now and more unified around a sense of purpose. A collection of schools without a unifying mission is not a recipe for success.

Data collected using a scale uniquely developed for this study (Box 8) showed that the tendency to collaborate is a disposition that predicts partnerships both within and outside the institution that one is affiliated with. Faculty members supportive of intra-institutional collaboration also were advocates of interinstitutional collaboration. Nearly two thirds (60 percent) of the faculty

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[5]   The programs are featured on the new Davidson School's Leadership Commons website (http://www.jtsa.edu/davidson-school-leadership-commons).

members surveyed (132 individuals across the three grantees) tended to report a high level of collaboration, both personally and in terms of their school culture, and relative to collaborating within the institution and collaborating with other institutions (Exhibit 10). The exhibit shows the mean scores on the interinstitutional collaboration subscale and the intra-institutional collaboration subscale. Scores were based on the ratings of survey respondents on a 4-point scale (*strongly disagree* to *strongly agree*).

Box 8. Tendency to Collaborate Scale[6]

Intra-Institutional Collaboration

1. In my institution, there are benefits from forming collaborative relationships across centers, campuses, or schools (intraorganizational collaboration).

2. I build on a professional network within my institution to continuously grow my knowledge in areas relevant to my job.

3. My school explores ways to foster collaboration among faculty members within the school.

Interinstitutional Collaboration

1. My school can achieve its goals better when working with other Jewish higher education institutions (regardless of their denomination) than working alone.

2. My school explores ways to foster collaboration with faculties from other institutions.

3. The dean of my school or the director of my program has communicated to faculty members that collaboration with other higher education institutions is valued.

Exhibit 10. Percentage of Faculty Members by Tendency to Collaborate

Legend:
- Interinstitutional Collaboration
- Intra-Institutional Collaboration

High (60%): Intra-Institutional Collaboration 3.23, Interinstitutional Collaboration 3.18
High (40%): Intra-Institutional Collaboration 2.25, Interinstitutional Collaboration 2.14

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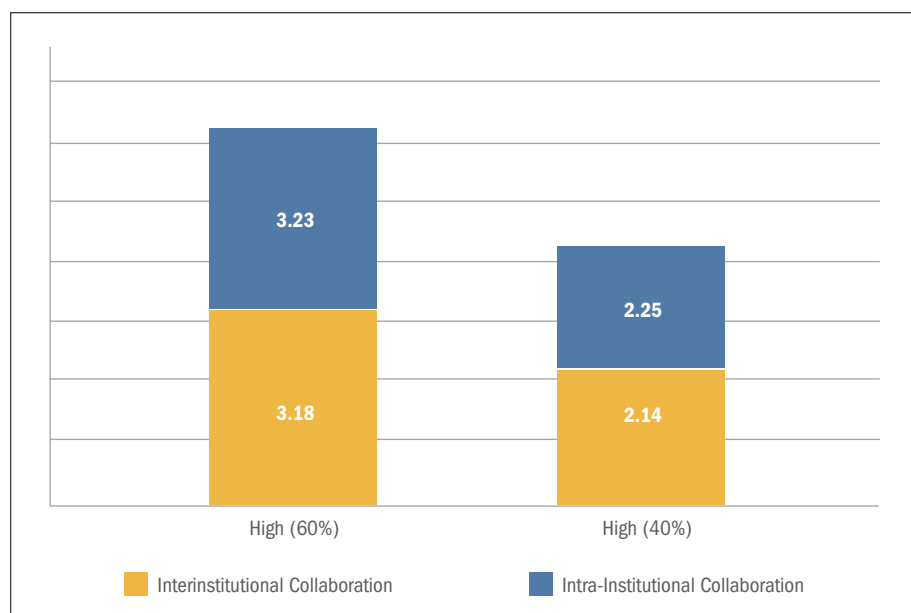
[6] Both subscales had adequate reliability as indicated by Cronbach's α (intra-institutional collaboration, $\alpha = 0.60$; interinstitutional collaboration, $\alpha = 0.61$).

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, which 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. As described by YU President Richard Joel:

> I think everybody has learned [that] there is a real value to stay connected to HUC and JTS. The educators [technology] collaborative was really successful in terms of making sure that we share understandings of what is succeeding and what is not and where we cannot cooperate. We are certainly open to collaborations. We have been able to develop, through the YU School Partnership, a New Org [a new Jewish day school organization; http://newjdsorg.org/], which transcends the streams [of Modern Judaism]. Although there are particular needs that remain, for all of these different streams, there are not unbridgeable differences due to religious denominations. [Similarly,] one of the great things about the Jim Joseph Foundation's grant is making a statement that the different streams should really see how they could homogenize. And although we do not want to homogenize, I think there has been a greater understanding on all parts, and a tremendous cultural breakthrough in how the education staff and JTS, HUC, and Azrieli [at YU] have come to view each other, and I would venture to say [that] there has been some demystification on the part of the Conservative and Reform in terms of Orthodox education—that is a lasting contribution.

Under the Education Initiative, the grantees developed open and close communications and gained a new perspective on program development, as noted by HUC-JIR President Rabbi Aaron Panken:

> In cooperating with JTS and YU, we have become more aware of other programs in Jewish education and what their offerings are. One of the questions that came out of this is whether our programs are competitively placed within the market.

According to the grantees, the most desirable model of collaboration involves institutions with different areas of expertise or program delivery capacities that together can address a common need or gap, which cannot be addressed by each organization alone. As a major research university, the capacity of YU, for example, is much larger than the capacity of the seminaries in terms of both the size and number of programs and the supporting infrastructure. As a result, it was harder to get YU administrators and faculty members to see the benefits of interinstitutional collaboration for their courses and programs for particular areas of collaboration. Nevertheless, administrators and faculty members at HUC-JIR, JTS, and YU proposed several areas for interinstitutional collaboration, including the following:

- Professional development seminars in Israel
- Professional development programs tailored to Jewish communities
- Programs for the unaffiliated and interfaith families
- Educational resources for nondenominational schools

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 to date have not successfully demonstrated that the "whole is greater than the sum of its parts." This partly results from a lack of clarity on the objectives and metrics for success for interinstitutional collaboration. The case of the EJE Network exemplifies this point. Participating alumni noted that if one network goal is to increase collaboration across Jewish educational organizations in the field, the goal should be made more explicit by including a clear, periodic statement of progress made to that end. Although alumni of the three grantees reported that the quality of workshops offered through the network was outstanding, they reported little to no impact on networking with the alumni of other institutions. They suggested that the following actions should be taken before or during learning events to promote interinstitutional relationships and collaboration:

- **Distribute information about each program represented by alumni.** The information may include details on the curriculum and the professionals (setting and professional experience) targeted by each program. In addition to program-by-program descriptions, alumni would benefit from comparisons of the key principles and theoretical models taught in each program.

- **Organize social activities explicitly geared toward helping alumni become acquainted with one another as a means of promoting communication and collaboration.** Alumni of the three grantees acknowledged the complexity of this task, given that not all alumni attend all network events or respond to e-mail or social media messages from the EJE Network.

Alumni suggested that the overarching mission of the EJE Network should be focused on field building; a secondary goal should emphasize expanding the resources and tools available to alumni. Each grantee has already invested resources in alumni relationships (e.g., social media pages and learning events). The power in a cross-institutional network, according to alumni reports, resides primarily in its ability to develop a discipline or field of study.

Alumni believe that networking opportunities are beneficial. Because alumni have limited opportunities to attend conferences on Jewish education, they identified several advantages to participating in the EJE Network, including the following:

- Receiving updates on current research into experiential education

- Learning new tools for overcoming challenges in program design and implementation

- Having a sense of belonging and professional identity

- Learning information about job openings for EJE professionals

- Gaining a greater sense of collegiality among competing Jewish education organizations

DISCUSSION AND RECOMMENDATIONS

This study's findings suggest that successful interinstitutional collaboration depends on several readiness factors. The factors identified in this evaluation include (1) compatible structures and institutional goals, (2) a culture of collaboration (e.g., faculty attitudes favoring collaborative structures rather than siloes), and (3) a clear articulation of how interinstitutional collaboration can help partners accomplish goals that they cannot reach alone. These findings are consistent with the research of Kezar (2006), which found that a certain amount of organizational redesign (in terms of culture, structures, and processes) must take place prior to collaboration to gain the advantages that collaboration can offer. Developing readiness for collaboration is a process that may

take a whole year to achieve. Every collaborating partner has its own culture that must be learned by the other partners for complex collaboration to succeed. When a new faculty member comes to a university, even from a similar research institution, it may take 12–18 months to learn the institutional culture (Carey et al., 2005). In collaborations across different universities, it will likely take at least as long for participants to learn each other's institutional cultures. Issues related to the administrative structure, the reward structure, internal compensation for teaching and service, tenure, and promotion criteria are important yet widely variable components of institutional culture. When a predominantly research-based university and a teaching-intensive institution address either service or research issues together, issues of translation and collaboration will be complex. Specifically, faculty incentives to perform even similar activities may be quite different at each institution.

AIR has five recommendations related to collaboration:

- **Strive toward linking the mission of the institution to values of collaboration.** Articulate a vision that the goals of an institution can be achieved through collaborative relationships. Emphasize the efficiencies of partnering with programs and institutions that have complementary skills.

- **Create a mission statement for interinstitutional collaboration.** The mission statement should communicate the value of the collaborative effort. In addition, it should define and communicate measurable outcomes.

- **Invest in identifying and creating strategies and structures that will move the grantees beyond valuing collaboration to enabling and sustaining collaboration.** Creating a reward structure is key to motivating faculty members to pursue interinstitutional collaboration in teaching and research (Kezar, 2006). Faculty and staff need to be rewarded for creating collaborations that save resources. Rewards need to be in "currency" that faculty and staff value: bonuses, raises, or released time.

- **Allocate time for interinstitutional collaboration as part of events and conferences.** In building agendas for in-person and online learning events, joint programs should incorporate experiences designed to foster inclusiveness and collaboration. These objectives can be accomplished by using interactive activities (e.g., personal sharing and team challenges) to help participants form relationships with alumni from other institutions.

- **Leverage intra-institutional collaboration to support interinstitutional collaboration initiatives.** The three joint programs described earlier operated primarily without coordination and support from offices and departments that have overlapping goals and areas of expertise. The grantees should identify goals shared by the EJE Network and the grantees' alumni offices (e.g., identifying common alumni viewpoints and interests) and seek ways to leverage the work of the alumni offices to maximize the efficient, effective operation of the EJE Network. For example, the alumni offices may combine resources to operate joint events and enhance alumni access to career development resources. Improved programming could lead to deeper connections between a school and its alumni.

Conclusions

The Education Initiative promoted participation in professional learning as well as career pathways. The programs supported by the Education Initiative informed professional practice in the field. The program participants reported improved management and pedagogical skills. In addition, they did more to link vision statements, mission statements, and activities within their programs and train other staff members. They also became more proficient in infusing Jewish knowledge into programs by using additional Jewish texts and other cultural assets (e.g., Jewish art and music).

The master's and doctoral degree programs, along with the professional development programs, predominantly served those who were already working in the field of Jewish education. To accommodate the needs of busy professionals and individuals with families, the grantees developed programs specifically designed for veteran professionals returning to school. The new programs included part-time and online learning options that offered the flexibility that all potential participants required. The investments that each grantee made to introduce a greater variety of delivery formats and schedules are aligned with the overall trends in higher education (Council of Graduate Schools, 2009). Our findings show that one third of the program participants transitioned to leadership roles, and many others developed long-term career aspirations to serve in leadership roles.

The grantees have expanded their capacity to develop and deliver online and blended programs. By making improvements in hardware, software, support units, and staff professional development, the grantees offered new learning options that were not available prior to the Education Initiative. Although the use of technology was meant to recruit hard-to-reach learners, online learning is not yet a solution to the barriers of recruiting professionals who are uncertain about their professional learning goals. Recent case studies have suggested potential solutions for improving recruitment results, including establishing learning networks in collaboration with employers and offering "bite-sized" courses of short duration and low cost (Coughlan, 2008; Mind Gym, n.d.). However, some suggest that the reason people are hard to reach is that little effort has been put into recruiting them (Brackertz, 2007). Therefore, investing in recruitment plans that are based on market data may increase program enrollment. Grants to support future program implementation and recruitment may focus on target populations that are both in need of professional development and whose employers have career ladders tied to educational attainment and who can support and incentivize continuing education.

Overall, both the program participants and their employers were highly satisfied with program quality. Instructors' expertise in relevant theory and research and the explicit translation of theory into practice enabled the program participants to apply their newly acquired knowledge in their respective workplaces. The program participants identified only one area for improvement: the need for greater choice in selecting courses or classes to attend. Their expectation was that premier institutions of higher education should have greater access to high-quality courses in education and other relevant fields. Combined with a strong advisory system, a rich menu of professional learning options—in both degree and professional learning programs—can enable customized learning plans. The program participants reported increased self-reflection on professional practice and the motivation to pursue other learning opportunities to further their professional competencies in areas they identified as being beneficial to improving their practices. Moreover, the program participants changed the way they approached career planning after participating in the programs. They were more willing to apply for different types of leadership positions at their respective organizations as well as in other Jewish education settings.

Future programs should explore how educators from different settings can learn from each other. The program participants expressed interest in more exposure to research and practice from different disciplines to introduce them to new ways of thinking about programming goals and potential solutions to implementation challenges. Learning from their cohort members about the similarities in professional practice across settings enhanced their interest in exploring different career pathways within Jewish education. Both the program participants and their employers believed that educational leaders need opportunities to participate in national conversations about Jewish values, education, research, and relationships with Israel and international Jewish communities, which includes considering Jewish practice, educational programming, and staff development issues from a broader perspective than what is available in their local communities.

Another future direction is program alignment with the needs of local communities. For some programs, financial sustainability may benefit from grants by local communities and foundations. To better serve diverse communities, further program development may further strengthen the translation of theory into practice. Many Jewish communities include immigrants from different countries with different Jewish customs and preferences for behavior in the synagogue and at cultural events. Also, within communities, pronounced variations exist in levels of interest and opinions relative to learning, practice, and a willingness to affiliate with Jewish organizations. Leaders have the difficult task of bridging gaps and motivating individuals to find common purposes (Aaron, 2011). To prepare educational leaders for this task, professionals benefit from knowledge sharing among people representing different denominations, organizations, and types of expertise as well as among experts in both Jewish education and general education (Kelner, 2011). These opinions align with the general trend in higher education to offer interdisciplinary educational leadership preparation programs (e.g., master's and doctoral degrees) in general education (Jean-Marie & Normore, 2010).

Future program development efforts may include coursework that illuminates practices that can be generalized across settings. Both the program participants and employers sometimes referred to different settings in Jewish education as "factions" and noted the rarity of open dialogue among these segments. For example, Jewish day school teachers and leaders tend to attend conferences and forums for day schools, whereas camping professionals tend to receive professional development provided by camping associations. Both groups felt that the field could benefit from investments in knowledge transfer to better equip early career professionals for a variety of job positions. Higher education institutions can have an important role in achieving this goal.

The $45 million investment is a significant investment of Foundation funds. Investments of this magnitude are required to effect institutional change (Chan, 2015; Kienzl, Sponsler, Wesaw, Kumar, & Jones, 2011). The funding, which followed the recession that began in 2007 and ended in 2009, was critical for assisting Jewish education professionals to access job preparation programs. The funding helped build institutional capacity, such as the infrastructure for distance learning, and strengthened academic partnerships and agreements among the three grantees and between the grantees and other institutions.

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 professional learning norm in Jewish day schools and public school systems is introductory or awareness-building sessions in staff learning days and conferences, which is insufficient to trigger change in practice (Killion & Hirsch, 2012). 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 program components that make programs effective.

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Appendix A. New Programs Developed Under the Education Initiative

Institution	School or Center	Name	Type	Description
Master's Programs in Jewish Education				
HUC-JIR	Schools of Education	Rabbinical/Cantorial Education Program	Full-time, on-campus (in New York, Los Angeles, or Cincinnati)	This joint program enables rabbinic and cantorial students to take education courses toward fulfilling the requirements for a master's degree.
HUC-JIR	Schools of Education	Executive Master of Arts (EMA)	Blended (online learning and in-person seminars)	The 24-month EMA program is for professionals who have at least five years of experience in Jewish educational leadership positions. It includes in-person seminars, online courses, a 10-day seminar in Israel, and mentoring. Courses include Jewish educational leadership, organizational systems and change, teaching and learning, and modern Jewish thought.
YU	Azrieli Graduate School of Jewish Education and Administration	Preservice Master's Program (formerly, Accelerated Master's Program)	Full-time, on-campus (in New York)	This one-year, cohort-based, full-time master's program aims to prepare highly qualified educators for teaching positions in Jewish day schools and yeshivot.
YU	Azrieli Graduate School of Jewish Education and Administration	School Partnership Master's Program	Part-time, at school	This five-semester master's program was implemented for teachers in the Five Towns and other areas of New York's Long Island. To foster a sense of unity among area yeshivas, a different school hosted the weekly classes each semester. Participants took courses in cognition, educational psychology, models of teaching, classroom management, curriculum assessment, and educational technology and were observed teaching in the classroom.
YU	Azrieli Graduate School of Jewish Education and Administration	Azrieli Online Master's Program	Part-time or full-time, online	This program primarily targets students who live more than 50 miles from YU. Students can complete the program at their own pace while taking all the required Azrieli Graduate School courses online. Courses link evidence-based practices and Jewish education. A large course selection is available, including curriculum and assessment, educational psychology and Jewish learning, and models of teaching.

Institution	School or Center	Name	Type	Description
Doctoral Program in Jewish Education				
JTS	The William Davidson Graduate School of Jewish Education	Executive Doctoral Program	Part-time, online and on-campus	This part-time program is for veteran educators in leadership positions. Students complete core courses and customize their own learning plan from courses offered by JTS and partnering institutions.
Seminars and Induction Programs				
JTS	The William Davidson Graduate School of Jewish Education	Experiential Learning Initiative (ELI)	Part-time or full-time, on-campus	ELI is an optional specialization in EJE within the master's degree program that includes retreats, a course on theories and an overview of EJE, mentoring, field trips, and an internship.
JTS	The William Davidson Graduate School of Jewish Education	Kesher Hadash	Israel trip	This semester-in-Israel program is open to first-year students in the master's in Jewish education program. The semester combines academic learning with immersive experiential encounters with Israelis and Israeli society. Participating students earn a Certificate in Israel Education.
HUC-JIR	Schools of Education	Induction and Retention Initiative	Blended (online learning and in-person seminars)	This comprehensive program aimed to support early career professionals in their new jobs through the New Educator's Transition Boot Camp, online resources, and mentoring to support the successful transition of new graduates to their new workplaces and retention in their jobs.
YU	Center for the Jewish Future	Innovators Circle	Part-time, on-campus	This track of the Certificate in Experiential Jewish Education (CEJE) enables creative individuals to spend time and seed money developing projects that will further the Jewish community. Participants received ongoing guidance and access to experts in relevant topics.
YU	PRISMA (formerly, YU School Partnership)	New Teacher Induction Program (NTIP)	At school	NTIP, which is implemented in partner schools, includes a comprehensive system of teacher support that incorporates many varied experiences and opportunities for learning and support. Some of the opportunities include coaching, mentoring, and an individualized professional learning plan.

Institution	School or Center	Name	Type	Description
YU	Azrieli Graduate School of Jewish Education and Administration	Experiential learning missions	Various locations	These community service programs for prospective students who are considering a career in Jewish education or Jewish communal work provide hands-on teaching opportunities in traditional and nontraditional settings.
Certificate Programs and Leadership Institutes				
YU	The YU eCampus	Certificate in Differentiated Instruction	Online	This 30-week asynchronous online certificate program helps participants develop differentiated instruction in school settings.
YU	The YU eCampus	Certificate in Educational Technology	Online	This 30-week asynchronous online certificate program helps participants develop and use educational technology in school settings.
YU	The YU eCampus	Certificate in Online/Blended Instruction	Online	This 30-week asynchronous online certificate program aims to promote skills in pedagogy, course development, evaluation, and instruction in a blended learning environment.
HUC-JIR	Schools of Education	Certificate in Jewish Education Specializing in Adolescents and Emerging Adults (CAEA)	Blended (online learning and in-person seminars)	CAEA is a nine-month certificate program for professionals who are working with youth and young adults. By blending online learning and in-person seminars, the program focuses on four areas: adolescence and emerging adulthood, experiential education, transformation and organizational dynamics, and Judaic studies.
HUC-JIR and JTS	The William Davidson Graduate School of Jewish Education and HUC-JIR Schools of Education	Jewish Early Childhood Education Leadership Institute (JECELI)	Blended (online learning and in-person seminars)	JECELI is a 15-month leadership institute that aims to provide the knowledge and skills that Jewish early childhood education directors need to further develop a school's Jewish culture, positive climate, and relationships with the community plus the skills of the entire staff. The program was jointly implemented with Bank Street College.
JTS	The William Davidson Graduate School of Jewish Education	Jewish Experiential Leadership Institute (JELI)	Blended (online learning and in-person seminars)	JELI is a 17-month leadership institute provided in collaboration with the Jewish Community Centers Association to mid-career and senior management professionals at JCCs. JELI includes in-person seminars, monthly webinars, independent online learning, mentoring, and independent projects.

Institution	School or Center	Name	Type	Description
YU	Center for the Jewish Future	Certificate in Experiential Jewish Education (CEJE)	Blended (online learning and in-person seminars)	CEJE is a nine-month program that is designed for Jewish education professionals who have at least three years of professional experience. Participants study the key principles of experiential education pertaining to learning processes and group work.
YU	The YU eCampus	Professional development modules	Online	The professional development modules consist of 46 two- and four-week online courses on evidence-based practices, such as professional learning communities, project-based learning, the growth mind-set, and formative assessments, as well as practices for Judaic studies curriculum, such as Hebrew language assessment, Israel education, and tefilah education.

Appendix B. Participants' State of Residence at Enrollment and Postgraduation

	Enrollment	Follow-Up
New York	472	495
New Jersey	187	158
California	169	157
Florida	72	78
Illinois	45	48
Pennsylvania	42	40
Massachusetts	40	47
Ohio	40	46
Maryland	37	33
Missouri	33	31
Connecticut	26	24
Georgia	26	23
Texas	25	25
Tennessee	15	11
Colorado	14	17
Michigan	12	13
Arizona	10	12
Washington, D.C.	10	19
Minnesota	7	6
Washington	7	12
Wisconsin	7	8
North Carolina	6	2
Virginia	6	6
Rhode Island	5	4
Delaware	4	5
Kansas	4	2
Alabama	3	2
Indiana	3	2
Louisiana	3	0
Oregon	3	4
Kentucky	2	6
Nevada	2	4
Utah	2	2
Mississippi	1	6
New Mexico	1	2
South Carolina	1	1
Vermont	0	1
International	166	156