

THEORY OF CHANGE WITH COMMENTARY

Context: This strategy summary builds on what the Foundation has learned since its inception. As an established grantmaker, the Foundation is well positioned to continue some of its previous work while also proactively helping to shape the field of Jewish education today and for the future.

Mission: The Foundation's mission honors the legacy of Jim Joseph, who identified educating Jewish children, youth, and young adults as key to the Jewish future.

Compelling and Effective Jewish Learning Experiences: The Foundation defines these as experiences that draw upon Jewish wisdom, values, practices, culture, traditions and history to engage people in activities that guide them towards living more connected, meaningful and purpose-filled lives. Effective learning experiences have long-term influence on the ways learners think, feel, and behave. They empower learners to integrate the learning with their varied interests and identities. Compelling learning experiences enable learners to wrestle with topics of relevance to them in new and nuanced ways. They incorporate diverse voices and perspectives into the conversation.

The available array of Jewish learning experiences must constantly evolve and expand to serve current and future audiences of learners. They can take place in a wide range of settings including classrooms, homes, offices, camps, campuses, synagogues, retreat centers, community centers, service and travel experiences, and other public spaces. They are facilitated through various forms of interactive activities and content both online and offline, through cohort-based group learning experiences, and through one-on-one conversations and relationships.

For learning experiences to have deep and enduring impact, the learners must have a seriousness of purpose and dedicate time over days, weeks, months or longer.

Young Jews: The Foundation's core audience for Jewish learning is all young Jews from the United States, recognizing that it is increasingly important to purposefully include the families and friends of these young Jews—whether they are Jewish or not—to create the most meaningful Jewish learning experiences for all.

Connection, Meaning, and Purpose: These three complementary needs address our innate human desires to be in relationship with one another, to understand ourselves and what matters to us, and to make our own unique contributions to the world.

Excellence: The Foundation holds itself and its partners to the highest standards, routinely drawing upon best practices and expertise from outside the Jewish world.

Take Risks, Be Bold, and Experiment: Private independent foundations like the Jim Joseph Foundation have a unique role to play in supporting risk-taking and experimentation.

Systemic Solutions: The Foundation seeks to maximize its impact through leading and partnering on large-scale, field-wide efforts to address important areas within Jewish education that are primed for change.

Effective Grantmaking Practices: The Foundation is dedicated to building close relationships with grantee partners and co-funders, and to investing in multi-year support for organizational infrastructure, planning, and capacity building.

Listen, Learn, and Be Accountable: The Foundation promotes strategic decision making by actively listening to its beneficiaries and allowing their insights to guide its work; and by investing in research, evaluation, ongoing measurement, and the dissemination of learning.

Diverse Voices and Partners: Jewish learning and the Jewish community will be richer when our leaders, educators, and participants better reflect the full diversity of today's Jewish population. There is important work to be done to address a range of diversity, equity, and inclusion dimensions to attain this objective.

Intention (*kavanah* כוונה): The Hebrew phrase *chaz-keim v'am-tzeim* חַזְקֵם וְאַמְצֵם means *strengthen and encourage*. It is a reference to God's words to Moses in Deuteronomy 3:28: "Give Joshua his instructions, and imbue him with strength and courage, for he shall go across at the head of this people, and he shall give them the land that you may only see." This phrase highlights the Foundation's ongoing intention to elevate the work of others in realizing its mission.

Mission: To foster compelling, effective Jewish learning experiences for young Jews

כוונה:
חַזְקֵם וְאַמְצֵם

Core Assumptions:

In a world that is constantly shifting and changing, there remains a strong and persistent human desire for connection, meaning, and purpose. Judaism has continually evolved over thousands of years to meet these needs.

Through investing in Jewish learning experiences, we can help individuals identify new ways to enhance their lives, strengthen their families and communities, and contribute to a better world.

Guiding Principles:

Pursue and promote excellence

Take risks, be bold, and experiment

Seek systemic solutions

Embrace effective grantmaking practices

Listen, learn, and be accountable to our audiences

Engage diverse voices and partners

Long-Term Outcomes:

Culture: Throughout the field of Jewish education, a growing culture of excellence, risk-taking, and continuous listening and learning is infused into the values and practices of organizations, communities, and funders

Experiences: Modern manifestations of Jewish-inspired ideas, practices, and experiences emerge and gain widespread recognition for being essential to addressing the pressing needs of young people at key inflection points in their lives

Talent: Increased numbers of dynamic, pioneering Jewish leaders and educators are the driving force behind Jewish learning experiences that inspire young people throughout their lives

Learners: A more diverse and growing number of young Jews, their families, and their friends are participating in powerful Jewish learning experiences that inspire them to lead more connected, meaningful, and purpose-filled lives

Aspiration: Inspired by Jewish learning experiences, all Jews, their families, and their friends lead connected, meaningful, purpose-filled lives and make positive contributions to their communities and the world

Strategic Priorities:

Powerful Jewish Learning Experiences

Strengthen and grow Jewish learning through investing in program models proven to have deep and enduring effects on participants

Exceptional Jewish Leaders and Educators

Invest in training and developing dynamic, pioneering leaders and educators who are attuned to the needs of young people today

R&D for the Future of Jewish Learning

Catalyze development of groundbreaking forms of Jewish learning and expression by investing in R&D operations, new ideas, and creative partnerships

The **Powerful Jewish Learning Experiences** strategic priority expresses the Foundation's commitment to strengthening and scaling the impact of programs and organizations that have outstanding track records of effectiveness in delivering high quality Jewish learning experiences.

The **Exceptional Jewish Leaders and Educators** strategic priority focuses on the key people who make Jewish learning possible: the educators themselves and the leaders of the Jewish programs, organizations and communities who serve as changemakers and champions for Jewish learning.

Leaders of all kinds—new and seasoned, professional and volunteer, CEOs, and those in other leadership roles—have pivotal roles to play as catalysts, bridge-builders, influencers, and thought leaders to help organizations evolve and strengthen to meet our communities' changing needs.

Skilled Jewish educators are essential partners in the design and delivery of Jewish learning experiences. Many individuals may find themselves unexpectedly in the position of facilitating Jewish learning experiences for others. The Foundation considers all of these individuals to be Jewish educators, even if they do not see themselves in that way. This includes professionals, volunteers, rabbis, teachers, youth advisors, counselors, academics, students, mentors, artists, trip leaders, peers, children, partners, parents, grandparents, and other adult role models.

The **R&D for the Future of Jewish Learning** strategic priority recognizes that it is imperative to continually generate fresh ideas to ensure that the menu of Jewish learning opportunities will remain relevant to a changing audience of learners. This represents a newer area of work for the Foundation

and fills a gap in the field. In addition to early-stage funding to generate and test new ideas, this work includes developing platforms and relationships for R&D, and fostering understanding throughout the field of Jewish education about the importance of ongoing R&D.

Long-Term Outcomes: The Foundation's timeframe for achieving its long-term outcomes is ten years. The Foundation will apply broad strategies to measure these outcomes over time. Each long-term outcome is mapped to a set of shorter-term outcomes and specific indicators of progress that will be measured more closely.

Key Inflection Points: The Foundation recognizes that Jewish learning can be especially relevant as a way to help young people navigate through key inflection points in their lives. These may include, among others:

- Passages to adulthood – development of individual identity, moving out of a childhood home, getting a first job, moving to a new city
- Early parenthood – planning a family through pre-school
- Lifecycle moments – weddings, rite of passage / b'nei mitzvah
- Moments of 'seeking' – searches for spirituality, mindfulness, wellness, meaningful ways to serve / volunteer

Aspiration: This statement articulates the Foundation's vision for how the world will look when it has fulfilled its purpose. There is no timeframe for this vision. It cannot be achieved only by the Foundation's efforts, yet the Foundation intends to make a meaningful contribution to realizing it.