

## How We Use Research and Evaluation

Memo Included in March 2025 Board Materials

The Jim Joseph Foundation is committed to strategic learning and informed decision-making. As a result, we have a diverse array of research and evaluation studies that currently shape our approach to investments. This work transcends the conventional role of a mere accountability tool. Instead, we see our learning agenda as a dynamic process that contributes to the strategic growth and effectiveness of our grantmaking. With this perspective, we foster a culture of curiosity and continuous improvement and field-building.

Studies in our learning agenda generally fall into one of four categories:

1. Individual grantee evaluations that build the capacity of our grantees to be learning organizations.
2. Cross-portfolio evaluations that examine shared outcomes and synergies across various sets of grantee organizations to identify overarching trends and opportunities.
3. Funder-commissioned research that partners with external experts to delve deeper into specific areas of interest that align with our mission.
4. Grantee-commissioned research that empowers grantees to conduct research, enhances their own understanding, and contributes to a broader knowledge base.

Beyond individual studies, we also invest in the development of talent to ensure a robust, skilled, and diverse research and evaluation pipeline. This is meant to help grow the capability of communal organizations to apply learnings.

### **Team Learning**

For the Foundation internally, we look to integrate insights and learnings into our own day-to-day operations, thus modeling being a learning organization. We lean into our [First Principles](#), which include staying curious, centering youth, and being in relationship. We listen for themes and trends and actively question our assumptions. We regularly preview early research findings with relevant grantee-partners *before* public dissemination. We also read other research (that we are not funding) and share what we are reading, either with grantees directly or publicly. If it is necessary for improvement, we are unafraid to pivot. This is a key way we model what it means to behave as a learning organization.

The Deliberate grantmaking team shares reports on an internal platform and meets regularly to discuss important evaluation findings. We continue to support individual evaluation work both with funding and non-grantmaking support (i.e., support with requests for proposals, vetting proposals, membership on advisory committees, hosting convenings).

As the Emergent team commissions and conducts research and experimentation, we capture insights and learnings that guide strategy and inspire new areas of exploration. In addition to informing internal operations, and like the Deliberate team, the Emergent team seeks to share insights to socialize with the Foundation and the broader field. These two teams coordinate and collaborate to think deeply and in new ways about our [audiences](#) and [learners](#), and Emergent Strategy research is shared on our website's [Learning and Resources](#) page.

### **Interactions with the Board**

On a practical level, the Director of Research and Learning provides updates to and seeks guidance from the Research and Learning Committee. We maintain an [internal website](#) of the most widely used and relied on evaluation and research the Foundation has commissioned, in addition to individual memos and presentations to the Board detailing new research findings when warranted. All grant recommendations to the Board are grounded in data. For example, in 2023 the Board approved new initiatives that focus on early childhood educators, early- and mid-career Jewish professionals, immersive travel to Israel, new modes of rabbinic training, and a convening of communal professionals to discuss the talent pipeline issues facing the field. Each of these initiatives was prompted by recommendations from major studies the Foundation supported in the past five years.

In 2024 our research and our grantmaking was mainly focused on responding to the crisis of October 7, and we learned together at the September 2024 Board meeting how a few key grantees were using research to pivot to meet the moment. Now in 2025, grantmaking recommendations are informed by results from the flurry of studies that responded to questions arising in a post October 7 world as well as the many still-relevant studies from before then.

### **Our Portfolio of Research and Evaluation**

#### *Individual Grantee Evaluations*

We have multiple evaluations in progress at any given time. The fact that dozens of grantee organizations collect and use evaluation data internally is a positive sign that the field values the use of data and the capacity to collect it. Our signature grantees are sophisticated consumers of evaluation data and have proven time and again to be thoughtful partners. Because of their work, we rely on participant counts to understand the reach of the organizations we support, knowing that their programs are proven to bring a sense of connection, meaning and purpose to the vast majority of participants. Many times, these individual evaluations provide insight into the grantee's work and illuminate themes related to audiences, interventions, and settings that others share and are of interest to the Foundation. This recent [Census Report from FJC](#) is an excellent example of an individual grantee evaluation report.

#### *Cross-Portfolio Evaluations*

The Foundation's cross-portfolio evaluations are increasing and are generally major endeavors that can yield a plethora of data and insights relevant to many in the field. For example, stemming from the success of our teen initiative's [cross-community evaluation](#) and the development of shared outcomes and measures, we have applied learnings to think about shared outcomes and measures in other grantmaking areas as well.

Five signature grantees that directly serve young people, with Rosov Consulting, have embarked on a shared data collection effort that has incorporated a series of focus groups with participants that have been deeply engaged across multiple programs. This evaluation recognizes that these five organizations are not siloed – high proportions of their alumni also participate, over time, in the other organizations' offerings. The [focus groups](#) of alumni highlighted insightful aspects of these programs and their contributions to connection, meaning, and purpose.

Finally, a three-part cross-portfolio [evaluation](#) by Third Plateau of our Build grantmaking portfolio has yielded timely insights about needed non-grantmaking support and has led to recommendations to shift our expectations about timing and successful outcomes.

### *Research Studies*

Through the multiple studies the Foundation completed last year, we gained a deeper and more nuanced understanding of our audiences, of Israel education, and of educators and leaders in our community. We are helping to drive the field to respond by sharing these learnings widely so that our grantee partners and others can benefit from the knowledge and make directional changes based on them. In several cases, we are supporting additional collaboration and coordination to help ensure the long-term sustainability of those changes. We are also using our influence to advocate for more data-informed decision-making, a stronger pipeline of professionals with research and analytic skills, and more investment in applied research.

In all areas of our work, we look forward to bringing more evaluation and research to fruition in 2025 to benefit our grantees, our deliberate grantmaking and emergent teams, and the field at large.