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Out of Crisis, Learnings Shape Future Grantmaking

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Introduction

There has been a lot of informative writing about best practices in grantmaking during the pandemic crisis. For example, the Center for Effective Philanthropy (2020), published *Foundations Respond to Crisis*, a series that emphasized how foundations across the country prioritized flexibility and support for grantees by increasing communication, extending deadlines and advancing funding. The Jim Joseph Foundation, whose mission is to foster compelling, effective Jewish learning experiences for young Jews, recognized that the pandemic presented a crisis for Jewish organizations and the Jewish community in that being in community is a core aspect of Judaism and Jewish practice and values (Jacobs, n.d.).

Ironically, in early 2020 the foundation was poised to embrace a new, carefully planned, three-pronged strategy. Over nearly two years, the professional team and board developed a new theory of change and strategic plan that prioritized supporting powerful learning experiences, developing exceptional leaders and educators, and building a platform for research and development for the future of Jewish learning (Jim Joseph Foundation, 2022). The latter is a mindset and approach to grantmaking that quickly became even more critical and relevant for the foundation.

The Jim Joseph Foundation, like many other large funders, immediately took steps to loosen grant requirements related to deliverables and key metrics, including shifting restricted funding to unrestricted funding, approving no-cost grant extensions, finding ways to support CEOs and leadership teams through the stressful months ahead, quickly processing emergency funding, encouraging innovation

Key Points

- Like other philanthropic organizations during the early weeks of the COVID-19 pandemic, the Jim Joseph Foundation took steps to loosen grant requirements, support CEOs and leadership teams, and provide funding for emergencies and innovations.
- The foundation, which strives to bring consistent expertise with evaluation and research in untroubled times and whose mission is to foster effective Jewish learning experiences for young Jews, has a unique perspective when reflecting on learning. So another area that required flexibility was in the re-examination of learning plans to take advantage of the “forced experimentation” imposed by the pandemic lockdown.
- In March 2020, the foundation paused ongoing research and evaluation projects to determine the extent to which the pandemic and economic crisis would impact the quality of the data, and then crafted new learning questions and plans to take advantage of the opportunities in the moment. It pivoted to redeploy resources within ongoing projects and funded new studies that allowed for fast turnaround of findings. Studies looked at how the internal foundation team responded to the crisis, how grantee-partners pivoted to online programming, and how the crisis and online programming were experienced by target populations.
- This article reflects on what the foundation learned from being open to redirecting evaluation and research, and how that learning has impacted future planning. Sometimes a crisis brings value — and the sooner that understanding and mindset is embraced, the better.

By the end of March 2020, the foundation had reached out to all grantees and contractors to pause any research and evaluation that was ongoing — either in the midst of data collection or about to begin data collection. For each project, program officers needed to understand if the pandemic and economic crisis would impact the quality of the data, and they learned that in most cases the answer was yes.

and adaptability, examining merger possibilities, and staying in close communication with the board. In 2020, grants for general operating grew to 35% of grantmaking from 19% the prior year, and one-year bridge grants were the large majority of new grantmaking in 2020. Overall, one-quarter of all spending in 2020 was for emergency funding, reflecting the need for nimble decision-making.

Another area that required flexibility and delivered high return on investment (and that has not received as much attention) was the re-examination of learning plans in that moment of crisis to take advantage of the unique opportunities. In many cases, these opportunities were forced experimentation and innovation.

The Jim Joseph Foundation has a long history of prioritizing evaluation and research, and historically has invested 2% to 3% of its annual spending in learning. The majority of its grants have a percentage of their budget, at times up to 10%, dedicated to evaluation, usually by an independent contractor. This is part of the

foundation's strategy to build the capacity of its grantee-partner organizations. Evaluators assist grantees in defining measurable outcomes, articulating logic models, designing data-collection instruments, and ultimately making sense of findings so that future activities are more likely to reach successful outcomes. The degree to which organizations eventually are able to do this work internally is a positive outcome for the foundation. In March 2020, several grantees were in various stages of evaluation projects.

In addition, the foundation invests in applied research and cross-portfolio evaluation, which involves several grantees who are working toward similar outcomes, with similar populations, or in similar settings. With research and cross-portfolio evaluation, the goal is less to build the capacity of grantees and more to build the field and answer questions that the foundation asks about its investments and strategies.

In March 2020, several large research projects were also in various stages of progress. One of particular note was a study of the national employment market for Jewish educators. Data collection was poised to begin to understand how many Jewish educators were in the field, the characteristics of their careers to date, where they worked, and their workplace conditions.

Asking New Questions

By the end of March 2020, the foundation had reached out to all grantees and contractors to pause any research and evaluation that was ongoing — either in the midst of data collection or about to begin data collection. For each project, program officers needed to understand if the pandemic and economic crisis would impact the quality of the data, and they learned that in most cases the answer was yes. Project timelines were immediately extended indefinitely, and each project was given leeway to be put on the back burner until the organizations could deal with the more pressing issues they faced.

In that same moment, the foundation began to re-examine its own learning questions. Prior to March 2020, a structured framework — a research agenda — was guiding measurement,

evaluation, and learning activities. The pandemic, however, created an atmosphere of adaptability and innovation around program delivery, organizational management, outreach to target audiences, and Jewish community engagement and experiences. The foundation decided to pivot its learning plan to take advantage of the opportunity to learn from this unique time period. Resources were redeployed within existing projects to ask different questions, and new studies were commissioned that allowed for fast turnaround of findings. In order to gain knowledge that could inform future planning, the foundation funded:

1. a study of the foundation’s internal response to the crisis;
2. a study of how 13 grantees shifted to provide professional development programs online;
3. research into how high schoolers experienced virtual learning in Jewish day schools in spring 2020;
4. two market research studies, one on how young adult Jews engaged with online learning and another on how Jews experienced the High Holidays in the fall of 2020; and
5. a redirection of data collection for the study of the national market for Jewish educators to understand how the pandemic impacted that market in the short term and long term.

Important findings from these studies will influence how the foundation moves forward post-crisis.

What Was Learned?

The team realized that this was a historic moment for the foundation and was motivated to document how the staff experienced everything from abrupt new working conditions, operations, and ways of communicating, both internally and externally, to new funding collaborations and demands to review and loosen grant requirements. The main themes of the exploratory interviews aligned with the core principle articulated in the foundation’s strategic

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The internal study, which included two rounds of one-on-one interviews and extensive document reviews, found that the Jim Joseph Foundation was able to leverage its organizational and leadership strengths to meet the moment, although staff capacity at all levels was stretched. The challenges of the new reality also brought opportunities for rethinking how the foundation does its work. Its relational grantmaking proved critical for understanding grantee-partner realities and providing the support they needed, and the foundation leveraged its positive relationships with peer funders to lead collaborative responses to the crisis.

In fall 2020, with the intensity of the early days of the pandemic in the past and with staff having developed effective routines and systems to navigate working from home, a “next normal” emerged for the Jim Joseph Foundation. The transition from the first few months of the pandemic to the latter months of 2020 was less disruptive for staff because many of the elements felt familiar, such as regular communication with grantee-partners, a consistent schedule of board committee meetings, and constant attention to the foundation’s strategic priorities. However, staff were also aware that these familiar activities occurred in different ways than they did before COVID.

The foundation sought information regarding the strategic priority to invest in training and developing dynamic, pioneering leaders and educators who are attuned to the needs of young people today.

Foundation staff felt very positive about its role in a new funding collaborative, the Jewish Community Response and Impact Fund (JCRIF),¹ and continue to believe it has been a net positive for the field. The fund was formed by eight Jewish foundations to help Jewish communal organizations weather and adapt to the unprecedented challenges of the pandemic through \$91 million in grants and no-interest loans. For the foundation, the experience of the JCRIF partnership offers important lessons about relationships and communication among leadership, staff, grantees, and funding partners.

Upon reflection, all staff agreed that the foundation's new strategic plan has the flexibility to retain its relevancy despite the changing landscape, particularly when it comes to long-term investments. There is confidence that the road map, which was designed pre-pandemic, will continue to guide decision-making.

Experimentation With Program Delivery

The foundation sought information regarding the strategic priority to invest in training and developing dynamic, pioneering leaders and educators who are attuned to the needs of young people today. Thus, the foundation launched a study, conducted through interviews and focus groups, to learn about the experiences of program providers of intensive professional development (Rosov Consulting, 2021). All of

the organizations that participated in this study found that moving online expanded their audience and reach. Many saw their now-virtual programs transcend geographic boundaries or niche audience appeal to attract more and more diverse participants from around the world. Others reached entirely new populations of learners who had greater time and motivation to participate. Finally, the online format increased access and convenience for educators and presenters too, as organizations invited speakers who might not have been able to appear in person but did have an hour or two to join a Zoom conversation.

While pivoting to programming online was a strategy borne of necessity, many organizations welcomed the opportunity to exercise their creativity. Now program providers anticipate that their future programming will be a hybrid of in-person and virtual opportunities, and that their investments in expanding online learning capabilities will only strengthen their organizations. At the same time, many program providers — and participants — felt the loss of in-person connections. Online learners can be more distracted and less engaged. By combining the two modalities, cohort programs can offer the best of learning both in person through meaningful relationship-building and online with convenience, flexibility, and diverse participation.

Understanding Participant Experiences

For many program participants, the newfound accessibility of online programming is by far the most noticeable and valuable development of the pandemic. Online programming lowered barriers for Jewish learning and engagement program entry and made ongoing participation easier. Questions posed in these studies reflected one of the foundation's core assumptions of our strategic framework, that "in a world that is constantly shifting and changing, there remains a strong and persistent human desire for connection, meaning, and purpose; Judaism has constantly evolved over thousands of years to meet these needs" (Jim Joseph Foundation,

¹ <https://www.jewishtogether.org/responseimpactfund>

2022, para. 3). These studies were designed to yield important findings to inform the foundation's investments in powerful Jewish learning experiences.

During the first months of the pandemic, Jewish young adults across the country surveyed via market research reported they engaged in a variety of different virtual experiences — everything from concerts and political events to lectures and trivia nights. This study showed that there are distinct needs that young adult Jews express related to desiring a sense of community, fun, and fulfillment. The pandemic affected many aspects of young people's lives — personal relationships, finances, and physical and mental health. Jewish young adults were eager for sources of connection to people they missed. The majority, 70%, felt that it was particularly important for them to connect to their Jewish identity during the pandemic, leading two-thirds of young Jews to participate virtually in something Jewish during the first six months of the pandemic (Beneson Strategy Group, 2020).

In another study, conducted through a survey of Jewish day schools (Rosov Consulting, 2020), two-thirds of high school students said that remote learning increased their connection to other family members. Two-thirds had conversations with family members about their school assignments, and more than a quarter said they talked with their parents more about Jewish learning. The top reasons students reported for not enjoying classes with online programming (general education and Jewish education) were that they didn't have the chance to interact with their friends, the content was not interesting, and the technology did not work well. The study found that online learning can be even more challenging for teachers than for learners. A number of respondents reflected that as teachers, they or their colleagues are accustomed to drawing energy from the kinds of interactions with learners that are hard to replicate online.²

[A study] was designed to inform the foundation's investments in training and developing exceptional Jewish leaders and educators, and showed that the pandemic had an uneven impact on the marketplace for Jewish educators across the U.S.

Another market research study of American Jews showed that more broadly, the challenges of COVID-19 have provided a unique opportunity to connect or reconnect with their Jewish identity, a sentiment that is particularly true among parents with kids under 18. Furthermore, one in three respondents said being Jewish is "more important" to them right now (during the pandemic), and many said the pandemic made them think differently about what being Jewish means in their lives (Beneson Strategy Group, 2021).

Impacts on the Employment Market

To learn about the employment market for Jewish educators, the foundation supported researchers in interviewing and surveying employers at Jewish communal organizations. This study also was designed to inform the foundation's investments in training and developing exceptional Jewish leaders and educators, and showed that the pandemic had an uneven impact on the marketplace for Jewish educators across the United States. Sectors that provide services that parents feel they can't do without — child care and day school education, for example — seem to be emerging in much better shape. Those sectors whose services are perceived to be a luxury or whose value is not fully appreciated — congregational schools and

² For an overview of the study's findings, *Has Remote Learning Set Back Jewish Day School Students?*, see [https://www.primmah.org/sites/default/files/uploads/Knowledge_Center/JDS Remote Learning Research Bulletin 20200812RC.pdf](https://www.primmah.org/sites/default/files/uploads/Knowledge_Center/JDS%20Remote%20Learning%20Research%20Bulletin%2020200812RC.pdf)

There is a widely shared assumption that children, young adults, and parents have been traumatized by their experiences of the pandemic period, and educators need to be sensitive to these circumstances.

local-level youth work stand out in this respect — were severely challenged and saw significant cuts in staff (Levites & Pomson, 2020; Gonshor Cohen & Pomson, 2020).

Whether providers were staffing up or staffing down, they were more likely to look for full-time rather than part-time staff. In regions where in-person programming is offered, health regulations and concerns made it riskier for employers to hire part-time staff and made the work less appealing to part-timers. When program delivery was largely remote, organizations found they could add to the hours of their best performers wherever they were located, and offer a product of consistently higher quality.

Technological capabilities and the ability to educate remotely are obvious skills that employers look for when they hire. No less important, and in some sectors even more important, employers are looking for staff who are responsive to the social and emotional needs of participants. There is a widely shared assumption that children, young adults, and parents have been traumatized by their experiences of the pandemic period, and educators need to be sensitive to these circumstances.

So, What Now?

The story of the unprecedented year — for the Jim Joseph Foundation and the field — continues to unfold. The impact of the pandemic on Jewish organizations and professionals will shape the

coming years, including the sudden shift to online learning that brought both losses and unexpected benefits; increased prioritization of mental health and wellness issues especially for teens and young adults; and the reshuffling of the landscape as some institutions falter, while others find new opportunities for growth.

Through a learning mindset imbued in our new strategic framework, the foundation has gained valuable lessons during these tough times of loss. Collaboration with other funders built long-lasting productive relationships that will benefit the field and community. Program officers strengthened their abilities to see issues and opportunities from another funder's point of view and gained familiarity with other approaches to grantmaking. Organizations vital to a strong Jewish community were supported financially through program shutdowns so they could be functional and provide much-needed programming as soon as public health ordinances allowed and demand returned. Many furloughed employees have regained their positions or even advanced in their careers. Audiences are growing due to the availability of online programming, and hybrid learning has become more effective as organizations learn that in-person and immersive programming can fill a unique purpose that online cannot.

These lessons learned enable the foundation to carry forward important insights and actions:

- Sometimes a crisis brings value — and the sooner that understanding and mindset is embraced, the better. The foundation acknowledges now that there is ever-present chaos and crisis in the background of work: that is the new normal experienced by everyone.
- There is remarkable power in collaboration under the right circumstances, and it takes time and effort to be effective. The foundation has continued the funding collaborations that were started in the early days of the pandemic, and has renewed its support for a second round of collaborative grantmaking.

- Grantmakers are more effective when they listen and are nimble and flexible, particularly in a period of crisis. Staff are confident that internal processes and decision-making can move quickly and still be right.
- Leaders, teams, educators, and participants might be overly stressed or anxious during a crisis; recognizing how to respond to these individuals' needs in this context is paramount to moving forward. The foundation now supports a wider variety of mental health and wellness initiatives, for program participants as well as for the communal workforce and organizational leaders.
- Long-standing and trusting partnerships that lead to clear communication with consultants are beneficial when the need arises for quick data gathering and information. The foundation continues to build these relationships with new and old partners to help it forge ahead, such as a new exploration into the technological capacity and needs of grantee-partners.
- Entering a crisis with a strong internal culture already in place enables an organization to build and maintain resiliency among the members of its team to navigate through it. Team building remains core to staff time together, and the foundation's values and principles provide the container to hold the work.

The Jim Joseph Foundation continues to support and inspire those efforts by holding itself accountable to asking important and timely questions, and looking for insights to guide its actions and decisions.

For the foundation specifically, the hard work of strategic planning pre-pandemic paid off with a useful and relevant framework to hang on to during throughout the pandemic, which it returns to afterwards as well. How that framework is implemented will be informed deeply by new knowledge and unanticipated experiences. Most importantly, the foundation affirmed that Jewish learning — in person and online, and in a variety of configurations — can provide connection, meaning, and purpose (the foundation's aspiration). Jewish organizations, leaders, and educators can be resilient and adaptable to crisis, and even rise to the moment in a way that moves the community toward a better future.

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