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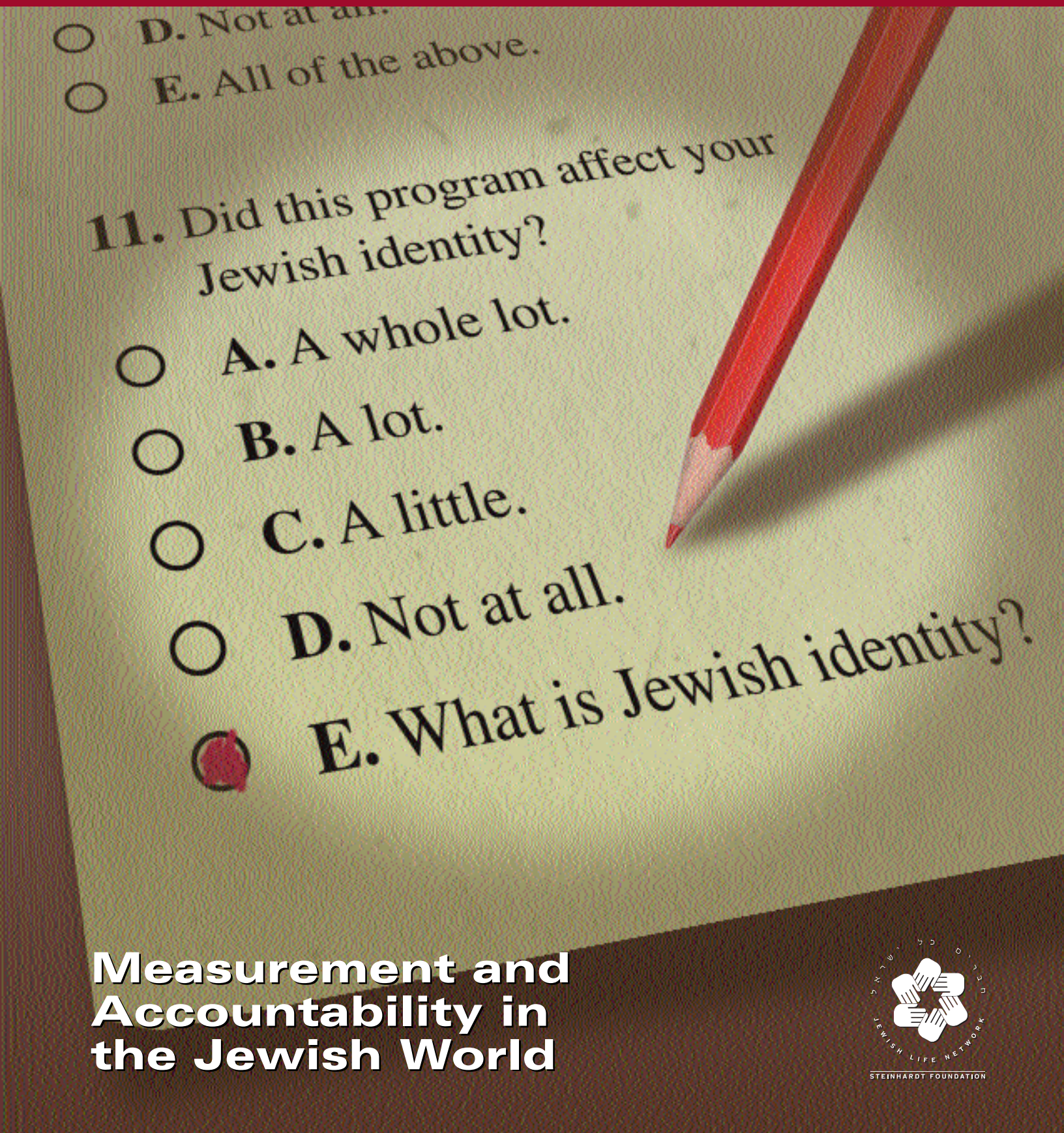

Measurement and Accountability in the Jewish World

JEWISH LIFE NETWORK
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Jewish Life Network/Steinhardt Foundation is dedicated to strengthening and transforming American Jewish Life to ensure a flourishing, sustainable community in a fully integrated free society. We seek to revitalize Jewish identity through educational, religious and cultural initiatives that are designed to reach out to all Jews, with an emphasis on those who are on the margins of Jewish life.

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From the Editor

Measurement and Accountability in the Jewish World

Creating and implementing Jewish identity programs can sometimes seem like shooting darts in the dark. Isolated in our Jewish non-profit cocoons, surrounded by others in the same profession, it can be difficult to know whether our ideas are profoundly visionary or foolishly misguided. In order to minimize the folly, it is crucial to invest in rigorous, objective research and evaluation of our work at all stages of a program's life span.

As with so many other seemingly obvious imperatives in the Jewish community, this is easier said than done. In theory, all would agree on the need for solid assessment, evaluation and accountability to ensure the optimum quality of our programs. In practice, however, the community has failed to invest sufficient resources in evaluation.

The reasons for this vary. Those who fund our programs sometimes dismiss evaluation as an unnecessary distraction from the implementation of their vision. Some consider data collection a waste of resources that would be better spent on new programs. On the other hand, many donors who do advocate evaluation underestimate the sizeable costs and amount of work and time involved, particularly in garnering information on a program's long-term impact on identity. When donors do provide sufficient resources for evaluation, the purpose is often not to obtain objective data but to garner figures that will support preconceived notions. Tension can arise between funders and researchers, with funders sometimes impatient when results reveal flaws in their assumptions.

Likewise, those who oversee programs are sometimes reluctant to include evaluation in their work. Assessment can seem intimidating to a start-up program already under considerable strain, and directors might fear that results will reflect badly on them. Nonprofit resources are often stretched too thin to accommodate the type of objective review necessary for effective evaluation. When budgets exist for assessment, there is often a concern that donors show inordinate interest in hard-edged quantitative results and ignore the nuances of qualitative research.

In the interest of creating top-notch initiatives, perhaps the best solution is to build assessment into program budgets from their earliest stages. Donors must come to recognize that solid assessment will not come cheaply or quickly, while program directors must work to create a culture of self-assessment as vibrant, committed and systematic as the rest of their efforts to revitalize Jewish life.

This issue of *Contact* explores the demands of measurement and accountability in our work. In some cases, contributors recount lessons learned from their experiences in program evaluation. Others recount the need for enhanced evaluation and measurement in areas currently under-explored. Still another contributor speaks of the need for more systematic and authoritative measurement of the American Jewish community itself. All share the conviction that strengthening Jewish life will not be possible without an honest commitment to evaluate our work and our world.

Eli Valley

Why We Need Measurement and Accountability

by MICHAEL H. STEINHARDT

If success in the Jewish community were measured by the accolades of our staffs and directors, we could claim victory in the struggle for renaissance. Practically every day, I hear reports of spectacular initiatives that have galvanized Jews towards renewed commitment. Isolated examples are used to prove the most profound conclusions. With remarkable sincerity, executive directors ask me to join them in their leaps of logic and to agree that hypotheses have been proven through little more than hearsay. When listening to these stories, I sometimes feel that I have entered an alternate universe where the weather is always balmy, the sun never sets and serene smiles plaster every face. If I ask whether the accolades are backed by outside evaluation, I am usually met with blank stares.

Unfortunately, too many executive directors and staffs fail to understand the need for objective evaluation at all stages of a project's trajectory. Instead, they content themselves with anecdotes told in the rhapsodic language of a love song. Such elegies share common traits: they prove the program's success, affirm the wisdom of the directors, and validate the good sense of the donors. Not a single preconceived notion is debunked.

The dangers inherent in such a professional climate should be obvious. Money is wasted on misbegotten initiatives; resources are misdirected; strengths are ignored and weaknesses allowed to flourish. However, effective philanthropy builds from one successful initiative to the next. We therefore imperil our agenda when we omit research and evaluation from our programs. Ultimately, flimsy assessment jeopardizes funding itself. When professionals are hesitant to provide objective, outside evaluations of their programs, my suspicion is immediately aroused. If they cannot withstand scrutiny, I wonder, how serious are they?

To be sure, it is understandable why program staff might present unsubstantiated anecdotes as objective truth. We are invested in our projects not only financially but emotionally. Wishful thinking is a powerful urge, and no one wants to focus on a program's flaws, particularly not when speaking with potential funders. In such a climate, it is easy to be guided not so much by objective analysis but by faith, which affirms each of our expectations. Nonetheless, without rigorous evaluations of our initiatives performed by outside observers, we have no way of knowing whether our efforts are effecting true change. In my view, one should battle one's own instincts and avoid, indeed ignore, unquantifiable anecdotes. While others may view this as too harsh in light of the contemporary state of research in the Jewish world, I believe it is necessary to be pristine in our numeric demands, indeed perhaps excessively quantitative.

Quantitative analyses are a necessity for all parties invested in our initiatives. Donors cannot make funding decisions in a vacuum. They require objective analysis to plot strategy and to ensure that their choices correspond to their overarching vision. Program professionals require outside assessment to ascertain the near- and long-term vitality of their projects. Oftentimes, programs must be tweaked or even systematically restructured when the original goals are not being met. In some cases, when evaluation reveals that the original objective is not feasible in the current climate, the goals themselves need to be adjusted. Finally, the ultimate beneficiaries of rigorous evaluation are the program participants themselves. Freed from the straits of wishful anecdotes, participants will avail themselves of the most resonant, compelling and even life-altering Jewish experiences available.

Admittedly, there are certain areas of our work that are not easily quantified. How, for instance, do we know whether a teacher truly succeeds in imparting Jewish connections in his or her lectures? Spirituality resists quantification; it would be simplistic to attach a number to the stirrings of the soul. Even the definition of success is problematic. Should we survey participants at the end of a lecture, or years later? I'm not sure we have easy answers to these questions, but I continue to feel that whenever possible, we should structure our research and assessment in a way that leads to quantifiable results.

Without rigorous evaluations of our initiatives performed by outside observers, we have no way of knowing whether our efforts are effecting true change.

At Jewish Life Network/Steinhardt Foundation, we try to foster a spirit of entrepreneurial philanthropy. Sometimes, we even succeed. Understanding that start-up ventures assume high risk both in the presence and in the absence of intense research and evaluation, we nonetheless base our philanthropic decisions on quantitative analyses whenever possible. Hopefully, this helps us make more intelligent decisions — and convince philanthropic partners to join us. Ultimately, rigorous assessment is smart business, and we need all the intelligence we can muster.

Michael H. Steinhardt *is Chairman of Jewish Life Network/Steinhardt Foundation.*

Although the principles underlying the evaluation are drawn from a long social scientific tradition, they had seldom been applied to Jewish education.

On January 4, 2000, a pair of El Al 747s landed at Ben Gurion Airport in Tel Aviv. Several hundred young Jews, most of them college students from across North America, stepped onto the tarmac and were whisked to a hangar where they danced and sang. Since then, almost 70,000 young Jews from around the world have received the "gift" of birthright israel, a free ten-day educational trip to Israel.

When the program was first announced, critics scoffed at the idea, arguing that ten days was not enough time to make a difference and that the trip should not be free. But such views have changed, in part because there is now evidence that the program makes a difference in the lives of its participants.

The decision to conduct a rigorous evaluation was made at the program's start. The program's initiators, Charles Bronfman and Michael Steinhardt, were convinced that the program would work. But they decided to allow their belief to be treated as if it was a hypothesis that needed to be tested by rigorous research. If they were right about the program, systematic data would help to ensure the program's continuation. If they were wrong, it would be important to know — either to improve the program or to redirect their philanthropic resources elsewhere.

Although the principles underlying the evaluation are drawn from a long

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Professors Leonard Saxe *and* ***Charles Kadushin*** *are co-directors of the birthright israel evaluation being conducted by the Cohen Center for Modern Jewish Studies, Brandeis University. More information about their research can be found on their website: www.brandeis.edu/cmjs.*

birthright israel: Learning From Rigorous Research

by LEONARD SAXE and CHARLES KADUSHIN

social scientific tradition, they had seldom been applied to Jewish education. The first principle was that the evaluation would include comparison groups: studying non-participants as well as participants. Comparison groups are standard practice in other fields and are essential if one wants to properly attribute effects of a program. It is difficult to know, for example, whether previous Israel experience programs for youth are the "cause" for higher levels of engagement or whether it is because participants come from families who are already engaged in Jewish education. It was important to determine whether birthright israel's effects came from spending ten days in Israel or whether they came about because those with a positive predisposition toward Israel were drawn to the program.

A second principle was that the impact had to be measured at multiple points in time in as objective a fashion as possible. Too often, program evaluations are based solely on questionnaires administered when participants are most likely to express positive feelings. Usually, such evaluations are conducted at the end of a program, when participants are still feeling the "glow" of what they have seen and done. Although such data are useful, this approach does not capture the impact of the program over time. The important question is whether the effects continue after participants return home.

Finally, the evaluation presumed that it is essential not only to know if the program has impact, but to understand how and why the program works. It was not sufficient simply to collect data from participants documenting changes. Such information would only be useful along with data that provide an understanding of any changes. This principle required collecting quantitative data through surveys and qualitative data through interviews and observation.

The design for the evaluation was what social scientists call a quasi-experiment. Those who participated in the program were compared with those who applied but didn't end up going. The first cohort of participants had many more applicants than available slots and the selection process was essentially random. This enabled comparisons between the attitudes and behavior of participants and a group of their peers who differed only in one respect — they did not have the birthright israel experience.

The other principles were implemented by mixing both quantitative and qualitative data collection. Surveys containing quantitative scales and open-ended questions were administered via the internet both before and after the trips to participants and non-participants. Post-trip surveys were conducted three months after participants returned home and, in some cases, were followed up by surveys administered eighteen months or longer after the trips. Qualitative information was collected by "embedding" research staff in selected trips. These participant observers were tasked with trying to understand the program from the perspective of participants. They observed participants everywhere they went — on buses, at biblical sites, at lectures and at falafel stands.

The results of the evaluation of birthright israel surprised even the investigators. The program consistently received almost uniformly positive evaluations on the criteria of meaningfulness, educational value and fun. It was surprising to find that a cohort of Jews thought to be disconnected and cynical could become so positive, and it was also surprising to find that only ten days in Israel could change their views of Israel and bring their Jewish identity to the forefront. Those who participated in the program were clearly different than those who did not.

The findings make clear that birthright israel changes the trajectories of Jewish involvement. The challenge is to understand these trajectories and identify the key elements of the program that determine their direction and speed. Impact does not seem to be solely the result of bringing young Jews together and providing them with positive experiences. There is something special about being in Israel. Additional influences, such as passionate educators and Israeli peers, add to the mix. The program appears to provide young Jews with positive views of their identity, an identity that is more than just a response to anti-Semitism and fidelity to their parents or grandparents.

birthright Israel is a paragon not only of a program that provides quality experiential education, but also of a program that has welcomed systematic research. Rigorous research is too often dismissed as the sole concern of impractical academics. But if birthright israel teaches us anything, it is that rigorous experimentation provides both tools for determining whether investments made by the Jewish community are worthwhile and new understandings of how future investments can be made more productive.

On Hillel's Numbers: The Difficulty of Quantifying Relationships

by SACHA LITMAN and ROB GOLDBERG

It's a Friday afternoon at State University, and Hillel is hosting its popular Mitzvah Day program, which draws hundreds of first-year students, athletes, fraternity brothers and sorority sisters. It is a programmatic gem that combines serious Jewish content and fun. Just as arriving students are about to enter the event, they meet a checkpoint where a friendly Hillel professional asks, "would you please swipe your Hillel connection card?"

This scenario is a dream for some and a nightmare for others. Proponents of tracking student participation argue that tracking would allow Hillels to analyze how many "touches" they have had with students, identify students' frequency of program attendance, follow up with students who have gone long stretches without being involved, and target new programs to students who have attended related events in the past. The proponents include many Hillel donors and top leadership who want to measure the "return" on their investment.

Opponents, mostly Hillel professionals, contend that tracking student participation is intrusive behavior that would defeat Hillel's hard-fought victory to be perceived as an engaging institution on campus for any Jew, no matter who he or she is. Furthermore, these opponents contend that measuring participation accurately is impossible; it would require recording every single non-programmatic interaction between Hillel professionals and Jewish students — such as an impromptu conversation while standing on line at the campus café — conversations which can easily number in the thousands for a Hillel professional each year.

Of course, both arguments are valid. After all, a key purpose of Hillel is to create positive Jewish experiences to engage college students, particularly those without strong Jewish backgrounds. This requires building trusting relationships. However, it is nearly impossible to stay on top of each relationship when the ratio can be as high as 1000 students per professional, and with many students appearing only a few times a year.

Hillel formally began to tackle this gap between tracking and relationship-building in 1998 when it created the Campus Strategic Services Group (CSS). CSS developed a self-assessment survey, now in its sixth year, asking Hillel professionals to report how many *unduplicated* students were in Hillel's student email database and how many were connected to Hillel in expanding concentric circles of participation:

- Core leadership
- Frequent participants
- Infrequent participants

Despite much initial resistance, these measures have become part of the Hillel culture. It is not uncommon now for a Hillel director to tell a prospective donor, visiting parent, or a colleague that "Twenty percent of our 2,000 Jewish students are frequent participants, 50 percent are infrequent participants, and 70 percent of the Jewish students are on our email lists, which is an improvement of 10 percent over last year's figures." Furthermore, Hillel has used the data to show Hillels who have not met their potential how their participation levels stack up against those of their better-performing peers. This data has helped campuses see the gap between what Jewish life is and a vision of what it could be, initiating organizational turnarounds.

Yet, this level of data analysis does not go far enough. First, the numbers are approximated by Hillel professionals retrospectively at the end of each academic year. While our sense is that the approximations are probably within 10 percent

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of the real figures, our hope has been that all Hillels are likely to skew their approximations in the same positive direction, thereby making comparisons across schools and longitudinally across years fairly valid. But there are too many hopeful assumptions here and we must update the approach.

Furthermore, these concentric-circle measurements do not examine the quality of engagement. The measures favor Hillels that hold many "big draw" social programs with low levels of Jewish content or impact. This shifts Hillels away from "significant" impact achieved through smaller group interactions and the concomitant qualitative interactions that occur. To be sure, some qualitative indicators can be taken into account when tracking program participation. For example, additional weight can be given to not only participation but to the Jewish content level of the program attended. Also, by tracking a student's participation in programs over time, a Hillel can develop a rich tapestry of knowledge about the quality of the relationship with that student and that student's developing Jewish identity. Without more refined, real-time systems in place to track participation during the course of the year, Hillel is falling short.

Unfortunately, many well-intentioned program directors or fellows have created a simple tracking system only to find that behavior unrewarded, not built upon by the Hillel or maintained by the director over time. It is easy to let the student tracking slip for a week, and then for a month, and then just stop doing it altogether because it is an extra, aggravating step in the work process. Only a Hillel director who prioritizes measurement will advocate for collecting the data and regularly analyze the data, using it to decide which students to target with new programs or how to allocate staff to follow up with students.

A culture of student tracking must be set by Hillel's Schusterman International Center. The International Center must work with directors and create incentives for them to place this work higher on their priority list. Ultimately, the International Center must capitalize on newly-emerged technology to help Hillels to track student participation at minimal time investment, all the while remaining vigilant about not invading a student's space.

Under the leadership of a new volunteer task force on measurement and evaluation, Hillel's International Center is considering several exciting new ideas for tackling the student participation challenge field-wide. By using several complementary methodologies at once, the committee hopes to triangulate on Hillel's true participation and impact. First, Hillel will redesign its self-assessment survey to gain more drilled-down and consistent information on participation. Second, Hillel is considering a more pervasive market survey to track the strength of Hillel's "brand image." Finally, Hillel is considering customizing web-based software and providing accompanying training to simplify the tracking process for many Hillels.

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By collecting data from Hillel professionals via the self-assessment survey, from students via campus surveys, and by developing student tracking software, Hillel hopes to move to the next level in measuring the success of its efforts and gain the ability to provide this information to donors and boards eager to see that their investments are resulting in increased student participation and increased quality of participation.

Evaluating and Improving Our Synagogues

by RABBI YONATAN GORDIS and RABBI HAYIM HERRING, Ph.D.

Although rigorous assessment has the potential to reinvigorate synagogues, most do not yet appreciate the crucial importance of evaluation. There exist horror stories where evaluation has been a pretext for firing a staff person. For some, it is only an administrative burden with seemingly no benefit. Still others believe that they are above evaluation, because their work has lofty outcomes. Evaluation, it would seem, puts quantifiable measures on their work, which they see as beyond measure.

Despite these challenges, STAR (Synagogues: Transformation and Renewal) decided to require evaluation in the development and implementation phases of all our programs, including our Synaplex Initiative. The purposes were manifold. We wanted to know what types of programming were more likely to drive attendance upwards for Friday nights in contrast with Shabbat mornings; what target populations we were succeeding in attracting and who we were missing; and whether funds invested in marketing efforts are really having an impact. In a larger sense, we wanted to know if our efforts with synagogues were producing meaningful change that could be documented for synagogue stakeholders.

After trainings, explanations and discussions with Synaplex synagogues, we developed a three-tiered evaluation process. We designed an online system to track synagogue attendance. We then created a more in-depth questionnaire tracking the variables that might affect synagogue participation. Next, we will gather qualitative data through periodic in-depth interviews and maintain a record of regularly scheduled conversations with representatives of the synagogue.

Our evaluation approach may loosely be described as "action research," which seeks to expand the scientific knowledge of a given field while also providing solutions to problems. Action research involves the use of outside expertise while engaging participants in the evaluation process. It is well-suited for an experiment like Synaplex, which requires us, as well as the synagogues, to learn on the go.

With patience on the part of STAR and its Synaplex synagogues, we are finally making progress. For us, progress means that we have comparison data on all of our synagogues that allows us to deepen our understanding about Synaplex. It also means that synagogues are acquiring an appreciation for the usefulness of investing their time in evaluation. On both levels, we will have actionable data that will enable STAR and its Synaplex synagogues to refine and improve our efforts.

Rabbi Yonatan Gordis *is External Evaluator for the STAR Synaplex Initiative.* ***Rabbi Hayim Herring, Ph.D.****., is Executive Director of STAR.*

Enhancing Jewish Education Through Evaluation

by LEORA W. ISAACS

The enterprise of Jewish education consumes enormous resources. More than $3 billion are spent annually on Jewish education and identity-building programs, including schooling, youth groups, camping, online learning, adult education, family education, cultural programming, youth philanthropy, leadership development, Israel experience, social justice and a variety of other experiential programs. The dollars come from tuition and fees paid by students and families; allocations from Jewish communities, foundations and individual philanthropists; and government grants and fundraising efforts. Besides these financial investments, educators and volunteer leaders commit countless hours and emotional capital to supporting, developing and running these programs — not to mention the investment of time and effort devoted by learners and their families in participation, car-pooling, etc.

It is no wonder then that funders, community leaders, educators — and even students and parents — are taking a hard look at "return on investment." They want to know more than what the program offers, how many participants attend, or if they say they like it. They are asking: "What *difference* did our dollars make? What *impact* did our efforts have? Was our time *well spent*?"

Nearly everyone involved in Jewish education has a treasured collection of anecdotes that attest to the value of what we do. But anecdotes aren't enough to convince savvy funders, program providers and potential participants that Jewish education and identity building programs are having their desired outcomes. There is growing demand for objective, systematic evidence of the impact of Jewish educational and identity-building programs. Which ones really make a difference? What are the key elements of programs that *do* have an impact? Answers to these questions will assure accountability and inform decisions about funding, program replication, and whether to enroll or participate in particular programs. They can also help inform decisions about how to improve and enhance programs so that they better achieve their goals.

How does one measure the impact of a program on something as abstract as Jewish identity? Recent research by field leaders including Bethamie Horowitz (*Connections and Journeys*, a UJA-Federation of New York publication) and Steven M. Cohen and Arnold Eisen (*The Jew Within*) have led many to broaden and deepen their understanding of Jewish identity beyond conventional indicators such as ritual observance and organizational affiliation. We now understand that Jewish identity is expressed more individualistically and idiosyncratically than ever before, and that it develops and is manifested in different ways and with different degrees of salience throughout the lifespan. The consequences of a particular experience may be observed immediately or may result in "sleeper effects," which are not evident until much later in life. We have thus learned that asking about a person's active involvement in religious and cultural-communal practices and activities does not fully capture the ways in which contemporary American Jews perceive and express their Jewish identity. Horowitz's and Cohen/Eisen's studies demonstrate the importance of also examining the salience or centrality of Jewish identity to the individual's self-perception (e.g., expressed pride in being Jewish, the strength of one's sense of belonging to the Jewish people, connections between Jewish beliefs and values and daily activities) and how this changes or is expressed differently over the lifespan.

Over the past decade, JESNA's Berman Center for Research and Evaluation in Jewish Education has worked with more than 100 Jewish education and identity-building programs to generate information to help improve their effectiveness (formative evaluation) and/or to demonstrate their impact (summative evaluation). We understand that criteria for success varies from program to program and from organization to organization. Some programs emphasize Jewish literacy; others encourage participation in communal activity; still others seek to enhance the impact of Jewish values on personal decision-making. More intensive programs can be expected to have deeper and more long-term effects; less intensive programs may serve as portals that set in motion "virtuous spirals" of deepening engagement.

Ideally, the process of evaluating a program's impact is begun simultaneously with the planning of the program. Planners begin by articulating their goals and stating them as measurable objectives. Then they design programs and activities that are likely to lead to these goals and simultaneously think about how they will measure success. Recently, Berman Center evaluation consultants have helped several programs develop "logic models" — graphic depictions that link desired outcomes (short and long-term) with program activities, processes and theoretical assumptions. Building these models not only guides the programs in thinking about whether and how the programs and initiatives they are developing are likely to lead to the desired outcomes, but also chal-

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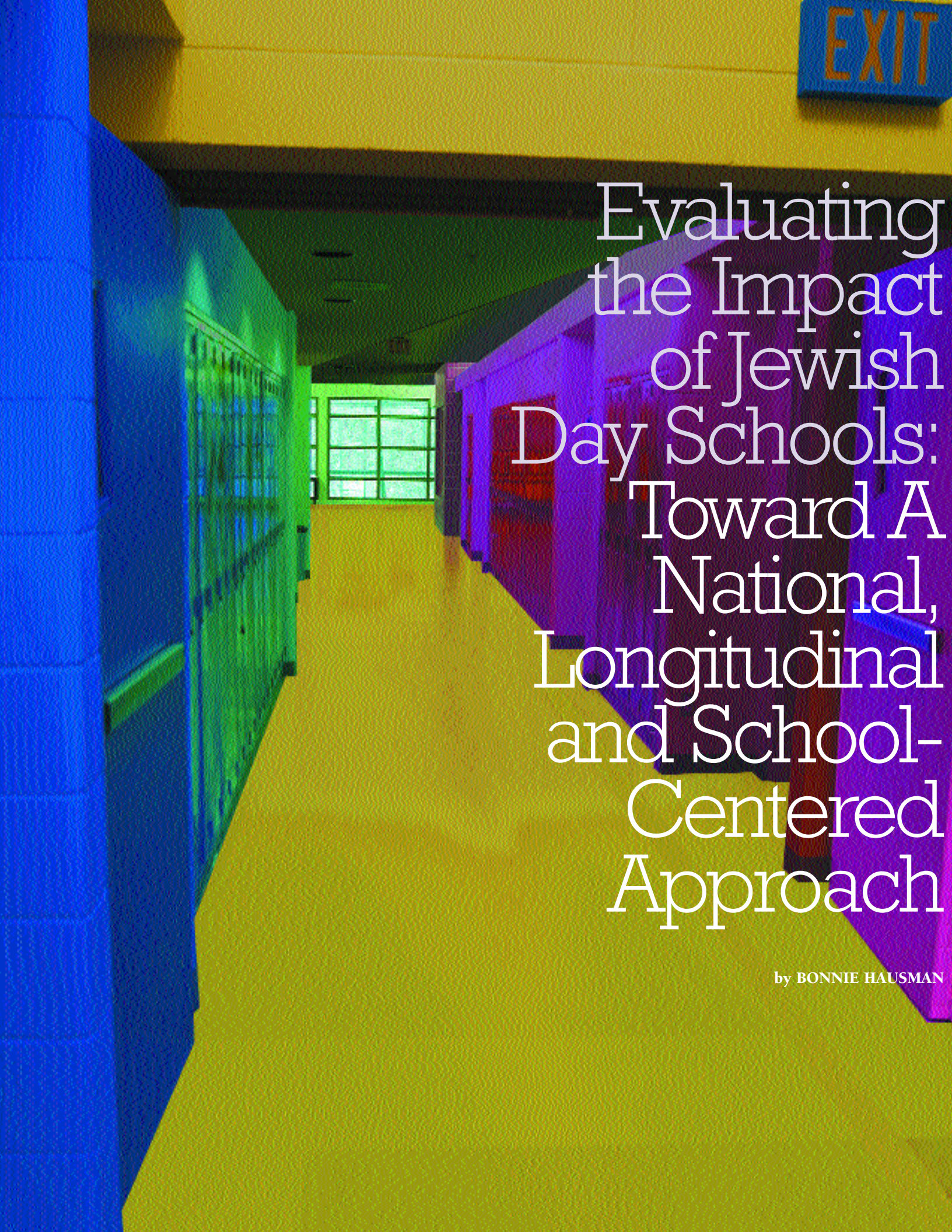
Educators can increase the effectiveness of their programs by aligning activities with goals and by using results of evaluations to guide mid-course corrections.

lenges them to define "success."

Applying best practices from the field of evaluation, we typically gather information from multiple sources (program providers, participants, non-participants, decision-makers, knowledgeable outsiders and other stakeholders) using a variety of methodologies (including interviews, written surveys, observations and document reviews) in order to insure the reliability and validity of our findings. We contextualize our findings through literature reviews and cross-case comparisons. Whenever possible, we utilize comparison groups and/or gather baseline measures in order to assess change by pre- and post-analyses. Understanding that program impact is expressed differently over time, we sometimes follow up with program participants at regular intervals.

Whether beginning at the outset of a program or further along, Berman Center consultants work collaboratively with key stakeholders (funders, sponsoring organizations, educators and program providers) to define program success in concrete terms. We ask alumni of Jewish-sponsored volunteer and philanthropic programs not only about their continuing involvements, but also about the extent to which they see social activism as an expression of their Jewishness. We often ask respondents to self-define their Jewish identities, by telling us what being Jewish means to them and how they demonstrate it.

The Jewish community has only begun to appreciate and utilize evaluation as a tool for enhancing Jewish education and identity-building programs. Educators can increase the effectiveness of their programs by aligning activities with goals and by using results of evaluations to guide mid-course corrections. Valid and reliable evaluation data can inform decision-making about program improvement, replication, funding and expansion. Setting aside time and resources for well-designed impact evaluations will not merely ensure accountability, but will surely increase "return on investment" for all stakeholders in the vital enterprise of Jewish education.



Evaluating the Impact of Jewish Day Schools: Toward A National, Longitudinal and School-Centered Approach

by BONNIE HAUSMAN

Anecdotal evidence suggests that day schools are richly rewarding environments that lead to favorable outcomes for children, families and Jewish communities. However, our hypotheses have never been tested through systematic research. As of today, in fact, no nationwide study exists on the impact of Jewish day schools. It is time to outline a research strategy that analyzes the immediate, near-term and long-term impact of a day school education.

Limitations on Researching Unique Effects

Several factors have made it difficult, if not impossible, to conduct research on the unique impact of day schools. To isolate the effects of other programs such as synagogue youth groups, camping or travel to Israel requires a research design with a large sample size. However, given the mutually enriching effects of formal and informal educational options, there is no advantage, and indeed there are political costs, in singling out a single most beneficial vehicle.

In addition, such a study requires even larger sample sizes to be longitudinal in scope—that is, following students and families to track their development over time. Jewish identity does not follow a linear progression from childhood to adulthood. There are twists and turns to identity development, and great variation in the length of time before the jury is in.

Finally, the construct of Jewish identity is complex and difficult to define and measure. The exorbitant costs of conducting impact studies leave Jewish communal leaders, donors and researchers with the obligation to plan future studies that will not only provide us with information about the impact of day school education, but will also serve the cause of school improvement.

The staff at the Partnership for Excellence in Jewish Education (PEJE) has been impressed with some small school studies of student and parent satisfaction and alumni perceptions, some more systematic than others. These studies have yielded important information for school and communal leaders about a set of attitudinal and behavioral outcomes as well as data to help address specific issues within their schools. A study of alumni from a Buffalo day school, for example, conducted by Dickson and Zakalik (2003), showed remarkable impact. Other smaller studies of graduating students have yielded fascinating and useful data. Despite these worthy efforts, the studies are limited by their strictly local focus.

National, Longitudinal Studies

To reach a larger audience of potential families, it is essential to gather data on a national level. Toward that end, PEJE advocates several possible projects that, if funded, would be national in scope, longitudinal in design, and lead to a much deeper understanding of the ways in which non-Orthodox day schools impact Jewish children, families and their communities. At the same time, these strategies would provide crucial information to help communities better understand any disappointing outcomes and assist schools in their own improvement journey. Possible national studies include:

- A comparative study of student performance: The study would allow comparisons of performance of students on standardized tests with results from national public, independent and even international schools.
- A study of parent (and other constituent) satisfaction: A single survey would enable us to compare levels of parent satisfaction in day schools with those in similar non-Jewish independent schools. It would also serve as a crucial resource with Jewish content for the improvement of individual day schools.
- A study of alumni perceptions of impact: This study might track students' attitudes, behaviors and skills during enrollment, at point of exit and then at post-day school intervals. It would also include reflections on their day school experiences and the school's preparation for college and beyond. Acquiring these periodic data would ultimately allow researchers to link perceptions with subsequent outcomes.
- A study of family outcomes: How are families impacted when they enroll their children in a Jewish day school? By tracking cohorts of families nationally and over time, we can learn about the mutually reinforcing benefits of engagement in the day school community. The fascinating work being published now by Alex Pomson has shown the impact on families who have enrolled their children in a Toronto day school; by bringing this study to scale nationally, we would enrich understanding about the dynamic relationship between adult learning, community-building and parenting children in Jewish day schools.

A School-Centered Approach

Our approach is based on a hypothesis that future attachment to Judaism and engagement with Jewish life will increase when students are educated in strong, well-governed and well-financed schools that offer high-quality academic and informal programs. Working from this premise, we have developed a diagnostic survey instrument that will create models to empirically establish the key indicators for increasing school enrollment and fiscal health. Led by Sacha Litman, Principal Consultant of Measuring Success, the PEJE Peer Yardstick® survey is expected to evolve shortly into a web-based management tool that day schools can access from our website. By using the survey, schools will be able to benchmark progress on key operational indicators and compare their own performance to that of similar schools. Although the project is not designed to investigate the long-term outcomes, it will yield some student-level data while strengthening the schools.

Conclusion

We have asked: What do we want to know, why do we want to know it, and what difference will it make? We want to know what non-Orthodox day schools have achieved for their students, the students' families and for the communities who have supported them. We want to know it because we believe that such studies have the potential to yield important and persuasive data to attract new non-Orthodox families. Significantly, this approach will also yield information that will guide schools in self-improvement and lead to better long-term outcomes for everyone.

Bonnie Hausman *is Program Officer at the Partnership for Excellence in Jewish Education (PEJE).* *She would like to acknowledge the contribution of her PEJE colleagues,* ***Naava Frank****, Senior Project Director, and* ***Suzanne Kling****, Communications Officer.*

Philanthropic Fundamentals: Evaluation and Accountability

By YOSSI PRAGER

Is there a difference between charity and philanthropy? I believe there is.

Charity is giving money, a contribution made to a person or organization perceived to be worthy or needy. Philanthropy, however, is more complicated and more ambitious: the effort to use money and other resources to accomplish a defined goal shared by the philanthropist and the funded organization.

There are two consequences to this definition of philanthropy. First, while a charity giver acquits himself by mailing a check, a philanthropist seeking to advance her own goals becomes a partner in the effort. As a partner, she scours memory banks and contact lists in search of ideas, expertise and sometimes even additional funding that will enhance the program or organization. Second, because the philanthropist makes grants in order to advance defined goals, she insists on accountability and evaluation both to measure impact (which can be thought of in business terms as a return on investment) and to identify ways in which the funded effort can be improved.

Unfortunately, serious evaluation remains the exception, rather than the rule, in the Jewish non-profit world. While grant proposals often include budget line items for evaluation, the funded organizations rarely initiate probing evaluations for fear that the results could cost them further funding. From the philanthropists' perspective, there is also a temptation to avoid evaluation on the grounds that it is time-consuming and expensive. I have heard more than one funder ask, "What will it show anyway?" Based on our experience at AVI CHAI, which funds programs that both promote Jewish commitment and draw together Jews of different religious backgrounds, the answer is "A whole lot."

AVI CHAI is admittedly in an uncommon position because it has both significant financial resources and a staff to oversee its programs. As a result, we undertake some very expensive evaluation projects that would not likely be undertaken by smaller foundations. These include efforts to measure the achievement of students using the new NETA Hebrew language curriculum; to assess changes in family Jewish practice as a result of day school enrollment; and to ascertain classroom usage of *BabagaNewz*, a monthly Jewish values-based magazine that is sent to nearly 35,000 students in over 1,000 subscribing schools. However, most of AVI CHAI's evaluations cost in the range of $5,000 to $15,000, which is within the reach of smaller foundations as well. The sidebar provides an example of one program that improved considerably as a result of a "low-budget" independent evaluation that we commissioned.

In brief, here are the most important points to consider in planning evaluations:

Yossi Prager *is Exective Director — North America for The AVI CHAI Foundation.*

1 In order for an evaluation process to be useful, donors and grantees must agree with great specificity about measurable goals for the program. Even purely quantitative goals need careful thought (e.g., what does it mean to "reach" 5,000 people?). We recently learned that when projects involve the internet, measuring the number of page views and the length of visits to the site is more useful than counting visitors. However, truly challenging issues arise in defining the qualitative goals — the nature and extent of the social, educational or cultural impact of the program. Without mutually-satisfactory goal definitions, there is a risk that the philanthropists' attempts to measure whether *their* goals are being met will generate conflict with grant recipients who have different objectives in mind.

2 Grant recipients should provide a schedule of deliverables. Evaluation (and grant payments) can be planned around the schedule. In any case, the nature of the evaluation should be decided up front, especially if the evaluation mechanism requires collection of baseline data.

3 Grantee reports, supplemented by philanthropist site visits, can be important sources of information and accountability. It is the philanthropists' responsibility to make sure that grant recipients understand what should be included in reports (e.g., hard data rather than anecdotal information) and also to ensure that reporting requirements are not so onerous as to divert the grant recipients from the work for which they have received funding.

4 Independent evaluations come in two rough categories: *formative* evaluations in the projects' early stages and *summative* or *outcome* evaluations at the conclusion of projects. Both have value, and both can be accomplished in either rough-and-dirty or serious ways. The benefits of outcome evaluations should be clear: they reveal the extent to which programs have met their goals. Formative evaluations have a different goal — to identify issues early on so that the project can be tweaked and improved. We have found formative evaluations within the first year of a project to be extremely useful.

5 Working with the grant recipient, philanthropists should choose evaluators who will be tactful and yet intellectually aggressive and incisive in investigating the funded project. The person need not be a "professional" evaluator (it helps to see a sample of an evaluator's writing to ascertain whether the style will match your needs). In each case, the evaluator should develop a written evaluation plan, which must be mutually satisfactory to the philanthropist and the grant recipient. Evaluation must be conducted in an environment of trust, in which it is understood that all parties seek only the truth for the benefit of the ultimate consumers of the funded programs.

There is significant literature on evaluation, and interested philanthropists will have no difficulty finding additional information in the general literature about philanthropy.

A final thought: most philanthropists see evaluation as a way of holding grant recipients accountable. However, the most important function of evaluation may be holding philanthropists accountable, at least to themselves. With no meaningful government regulation and little communal scrutiny (who, after all, wants to bite the hand that may someday feed them), it is all too easy to delude ourselves about the impact we are making. We owe it to ourselves, as much as to our grantees and the ultimate program beneficiaries, to ascertain whether we are using our resources effectively.

LEARNING FROM EVALUATIONS

In an effort to address the critical need to recruit and train new teachers for the growing number of Community high schools and middle schools in North America, AVI CHAI made a substantial grant to the Pardes Institute for Jewish Studies to create a two-year teacher training program that awards both a certificate from Pardes and a Masters in Jewish Education from Hebrew University. While the program is based in Israel, the participating students are from the Diaspora, and all make a three-year commitment to teaching in North America upon completion of the program.

AVI CHAI commissioned an evaluation at the end of what we and Pardes believed to be a successful first year of the program. The evaluation report offered a central surprise:

The students and evaluator concurred that while the Jewish studies classes at Pardes were first rate, the pedagogy and fieldwork components of the program needed significant enhancement. Furthermore, the students expressed concern about the administration of the program. It was clear that Pardes was experiencing challenges in the transition from the culture of a *beit midrash* (house of study) to the rigorous mode of a professional training program. At the same time, the students believed that AVI CHAI was managing the program from a distance without being available to discuss student concerns. All told, the evaluation highlighted important strengths but also significant concerns.

The evaluation spurred AVI CHAI to approve additional funding to enable Pardes to hire a program director who revamped the pedagogy program and who also worked with Hebrew University to develop a schedule that would enable students to take more courses relevant to their future careers. Pardes put more energy into transforming their institutional culture and soliciting input from students. For its part, AVI CHAI gave Pardes more leeway in shifting budget lines in order to meet students' needs; with additional budgetary control, Pardes made more decisions in-house, which increased student satisfaction.

One year into the restructured program, we asked the same evaluator to conduct a second evaluation. This time, he (and the students interviewed) assessed the program as first-rate in many of the respects that had been critiqued earlier. The first two classes of Pardes graduates are now educating and inspiring hundreds of day school students across North America.

— YOSSI PRAGER

Evaluating Your Start-Up Program

by MIRELE B. GOLDSMITH

What actually happens is never what you planned. Knowing what does happen is crucial because it allows you to make informed decisions about what to do next.

During the past six years, I have been involved in evaluating start-up programs in the Jewish community. These programs are experiments. They experience growing pains as they struggle with how to turn an idea into a reality in the face of the complexities of the Jewish communal world. My collaborations with these programs have strongly influenced my approach to evaluation. Among these assignments, I am currently providing evaluation coaching to ***spark:*** Partnership for Service on Heart**Action**, a program engaging teens in a Jewish service learning experience. The challenges faced by Heart**Action** are similar to those faced by many start-ups.

The Big Question: What is Actually Happening?

With most start-ups, the key question that evaluation can help answer is not about the ultimate impact of the program, but rather about what happens as the program is transformed from an idea into a reality. What actually happens is never what you planned. Knowing what does happen is crucial because it allows you to make informed decisions about what to do next.

Obtaining this first-hand knowledge of a program like Heart**Action**, which is being implemented at multiple sites, is especially challenging. Our first step was to find out what facilitators were actually doing by having them fill out a simple report form after each group meeting. This data proved to be very valuable. For example, the reports told us that facilitators were finding it necessary to create activities to introduce discussions about the texts included in the Heart**Action** manual. As a result we decided to revise the manual, providing activities to complement text-based discussion.

Outcomes Come Later

So what about changing the lives of your participants forever? Outcome assessment, which focuses evaluation efforts on monitoring changes in knowledge, attitudes and behavior of participants, is one of the most popular trends in evaluation. Although thinking about outcomes can be very helpful in planning a new program, focusing too heavily on outcomes at the beginning can be an exercise in frustration. At this stage, how the program will work is still not clear. If you design data collection instruments based on anticipated outcomes, you will likely end up with irrelevant data that won't help the program grow and succeed.

We spent a lot of time trying to articulate outcomes for Heart**Action** as we planned the evaluation. Looking back, we realized that with so many unknowns about the implementation of the program, it was impossible to settle on specific outcomes. Almost a year later, we are much more able to articulate the goals of Heart**Action**. With time, we will be able to specify participant outcomes that are closely tied to the actual experiences in the program. As the program expands, these outcomes will be a tremendous help to new providers as they implement the program.

Myths About Methods

One of the myths about evaluation is that statistics always provide the best answers. We have not caught up with the rest of the social science field, where it is now accepted that scientists are not objective, and that not all questions can be answered with statistics and the experimental method. In the evaluation of a start-up program, common-sense methods can provide very useful data. The key is to figure out what information will help you to make decisions about the program, and then to address how you can get that information without spending a lot of time, money or the good will of your informants.

Most people think first about surveys. Surveys are most useful when you are very clear about what questions you want to ask. With start-ups, it is likely that you are not exactly sure what questions are most important (let alone what answers to provide for multiple-choice responses). Methods that allow you to gather information without specifying categories in advance, and to formulate new questions as you go, are the most useful at this stage. A key component of our evaluation of Heart**Action**, for example, has been observation of Heart**Action** sessions with the teens. We have been able to see for ourselves what kinds of activities engage the teens and what aspects of the program are challenging to the facilitators. One thing we have learned is that we need to train facilitators to conduct group sessions with a more structured format.

In selecting methods, it is important to be realistic about what you can expect from the people implementing the program and the participants in terms of data collection. You should always consider how you can build data collection into the program so it is not an extra burden for informants. For Heart**Action**, we have scheduled regular conference calls for facilitators. These calls give them a chance to learn from each other and give us a chance to ask questions and to collect data without requiring them to complete additional forms. We are now experimenting with ways to collect data about participants' experiences through end of the year activities that can be integrated into a final session. We will be asking the facilitators to have teens put together a newspaper about their experiences in the program, including articles and pictures.

My only rule in choosing methods is that data collection has to be systematic. That is what separates evaluation from the everyday processing of information that we acquire in bits and pieces. Systematic data collection means that we are more likely to hear and take into account information that does not conform to our own preconceptions about what is happening in the program.

Moving Ahead

The kind of evaluation described here is messy. ***spark's*** program staff and I may change direction several times over the course of the year. The questions that we started with may answer themselves, and new ones become critically important. After analyzing the outcomes, the surveys and the data, we may need to revise our process. Waiting for post-program data is often not possible, and even incomplete data can be informative and useful in making decisions about the program. Like the development of the program, the evaluation is an iterative process.

Building evaluation into the development of start-up programs has two primary benefits. First, chances for success are enhanced as program staff incorporate systematic and timely feedback into their efforts. And second, program staff learn to think like evaluators. They begin to build data collection into their program design and to incorporate feedback into their efforts in a more systematic way than before. Although this kind of evaluation may not answer the ultimate questions about the long term potential of the program, it will enable the program to reach a point where such questions can legitimately be asked and answered.

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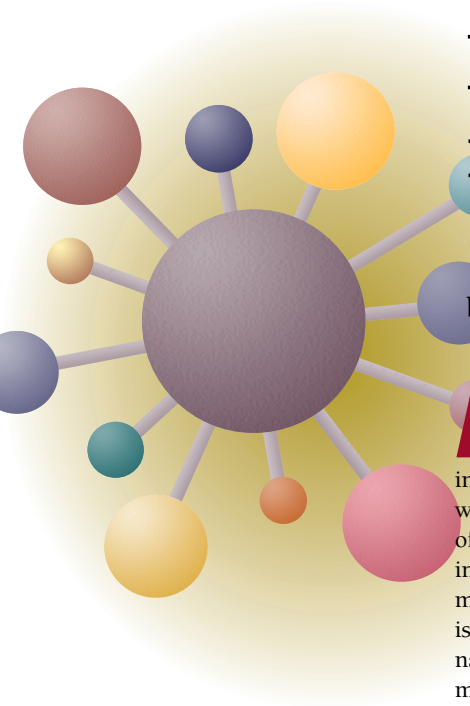

Envisioning a National Center for the Study and Assessment of Contemporary Jewish Life

by **RABBI DAVID GEDZELMAN**

As Jewish leaders design and implement strategies for engaging American Jews in the expanding possibilities of Jewish life and connection, they often feel as if they are flying blind. Vital information necessary for knowing who and where American Jews are and what points of contact are most effective in encouraging inspired Jewish community and commitment is mostly lacking. No one can agree on the basic Jewish population facts in America. Because each national or local population survey uses a different methodology from that which was used before, we are told that trends and trajectories for Jewish involvement, demographics and identity cannot be mapped or established. Those doing quantitative research do not necessarily coordinate their work with those doing qualitative research. Individual program evaluation is pursued in a virtual vacuum without the benefit of overall or local demographic data to give proper context. Research exploring the Jewish life journeys of those who might be engaged by a particular program is often not taken into account by those evaluating the effectiveness of particular programs.

Currently, there is no central address for the study and evaluation of the American Jewish population and the various enterprises aimed at preserving, transmitting, reinvigorating and renewing Jewish life in America. Sorely needed is a rigorous approach to understanding and evaluating Jewish life and its programmatic endeavors, one that puts under one roof the qualitative with the quantitative, program evaluation and identity studies, demographic analysis and the mapping of trends. A national Jewish clearinghouse for the results and coordination of research would be a tremendous asset to a community that simply does not have the information necessary for using resources effectively and intelligently to effect change. A Jewish national policy think-tank, which has the ability to keep track of all research being undertaken and to help the various researchers work together and share information, would go a long way towards giving the community the vital information it needs.

For example, as various initiatives in the area of Jewish early childhood education are being spearheaded, those involved with this work are often frustrated by incomplete data and information. Past attempts to even count the number of Jewish early childhood education settings in North America have been flawed. Likewise, while we may have good estimates, no one is completely confident in the numbers of children and of Jewish children counted in those settings. Those doing the counting in the various national organizations that have a serious interest in this field do not use a uniform methodology and do not readily share information with one another. Qualitative studies regarding the attitudes of parents who send their children to Jewish preschools have examined a tiny sample of schools in a narrow demographic swath. (The families studied include a disproportionate number of stay-at-home moms and leave out crucial information about the educational and child-care needs of Jewish families in which both parents work, not to mention families led by single working parents.) To be sure, information currently available regarding this field is valuable and has indicated strategies for moving forward. However, much more research needs to be undertaken in a more comprehensive manner if we are to succeed. A central address that could lead in coordinating this research, standardizing methodologies and convening conversations among the researchers as well as the planners, would make a crucial contribution to this field in a variety of ways.

On the macro level, we have no sense of how the overall demographic numbers of decline relate to the trends of renaissance and renewal in Jewish life. What is the calculus of American Jewish life? Are the pockets of renewal growing and influencing at a pace sufficient to eventually overtake the macro decline? Unfortunately, one's answer to this question will most probably be based more on one's overall disposition as either a pessimist or an optimist than on any availability of comprehensive research and study. Answering this question responsibly will not be achieved piecemeal. A comprehensive approach can only be undertaken in a comprehensive institutional research context.

Of course, to create an overall center for research with monopolistic intentions will not be ultimately helpful. Academics and thinkers are inspired and motivated by a diversity of contexts in which to do their work. But without a kind of central clearinghouse and national institute to coordinate and inform that work, the free exchange of ideas and sharing of information is compromised. Good science happens when research data are easily shared and exchanged. It is time for one of the Jewish community's academic institutions to rise to the task of leading the Jewish people in America in the enterprise of knowing itself.

A national Jewish clearinghouse for the results and coordination of research would be a tremendous asset to a community that simply does not have the information necessary for using resources effectively and intelligently to effect change.

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