

**Report of User Experience/Debrief Findings:  
Practitioner Council Members' Reactions to the Jewish Impact Genome's  
Data Collection Instrument**

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**Executive Summary**

This report addresses findings from the Jewish Impact Genome's (JIG) June 2019 study of the user experience of the online data collection instrument. The JIG enlisted its Practitioner Council members, a broad spectrum of Jewish Engagement organizations, to pretest the Instrument and provide constructive feedback. The Council members were asked to consider the extent to which question-wording and content were clear and about the Instrument's ability to capture the program's design and its relationship to the six areas of Jewish Engagement outcomes articulated in the JIG's impact taxonomies. This report focuses on Council members' perceptions of the Instrument as a tool to help practitioners and philanthropists maximize impact. Council members reported general satisfaction with the Instrument and understood its potential as a field-changing tool. On the whole, their criticisms and recommendations centered on technical issues that are being addressed and incorporated into revised versions of the Genome by the JIG team.

**About the Jewish Impact Genome**

The Jewish Impact Genome is a part of the Impact Genome Project, stewarded by Mission Measurement. The Impact Genome Project seeks to set evidence-based standards to measure, report, and benchmark social outcomes. The goal of the Impact Genome Project is to create universal frameworks for outcomes, program activities, beneficiaries, and contextual factors used by nonprofits and others focused on fostering positive outcomes.

The Jewish Impact Genome aims to establish sector-wide outcomes for effective Jewish engagement and provide the field with a survey tool that promotes, collects and analyzes shared impact learning. The initiative investigates what the field is doing, is it working, and for whom. The purpose, therefore, is to democratize impact learning and empower all Jewish organizations to self-evaluate using standards and evidence-based tools. The Genome tool is meant to create benchmarks in the field so that stakeholders can compare agencies and identify the program designs that yield the greatest impact. Overall, the Jewish Impact Genome will add to the sector's culture of accountability and provide greater confidence for organizations and philanthropists investing in Jewish Engagement. To answer these questions, the Genome has developed a robust taxonomy framework and universal language of impact across the arena of Jewish engagement. By collecting, analyzing, and coding hundreds of studies, program reports, and evaluations, the Genome is creating a platform through which organizations, funders, and stakeholders can reliably, consistently, and effectively measure and report on the impact of their programs.

The Genome Team is committed to:

- Developing research questions and incubating initiatives, which challenge the Genome Team and the broader field to think more deeply about Jewish engagement interventions;
- Synergizing the fields of implementation research and social impact with American Jewish studies;
- Learning from an Advisory Council comprised of leading scholars and organizational leaders;
- Refining its work with support and input from a Practitioner Council of a diverse group of agencies creating meaningful Jewish engagement interventions.

### **Assessment and the Jewish Engagement Field**

Scholars of American Jewish life have started to explore the intricacies of the contemporary Jewish Engagement space. Joshua Friedman, Moshe Kornfeld, Jack Wertheimer have published important work on the rise of “mega-funders” and their millennials in driving the interests of Jewish Engagement agencies. In addition, Shaul Kellner and Michal Kravel-Tovi have demonstrated the experiences of Jewish Federations in adapting to the new realities of fundraising and their role in continuing the shape communal dialogue. Challenged by decreasing funds to allocate, Federations have repositioned themselves as conveners of Jewish Engagement, partnering with agencies and funders to organize their communities to strategize and support, for example, “education” and “continuity.”

This has shaped the expectations of stakeholders in Jewish Engagement. Philanthropists no longer offer allocations and grants with minimal levels of accountability. Instead, practitioners are asked to provide logic models to show how and where they aim to make an impact on Jewish lives. Grantees understand their responsibility to report on the delivery of their programs, showing evidence of how their “theories of change” were set into motion and carried out with success. Well-financed agencies hire external evaluators to assess their programs. Other agencies survey participants themselves, using a number of cost-friendly online tools. However, their language for impact differs, as is the methods and instruments used to research and articulate outcome achievement.

### **Participating Council and Field Representation**

The Genome Team assembled a Practitioner Council to capture several aspects of the Jewish Engagement field. These included:

- Outcome Breadth. The Practitioner Council members conceive their impact in different ways and utilize different activities to achieve those outcomes. This diversity was intended to foster dynamic learning and refinement of the JIG’s outcome research.
- Legacy Organizations vs. Innovation Agencies. The Jewish Engagement space includes institutions that have served North American Jewry for decades and have supported to

long-held outcome intentions of funders and practitioners. Other organizations have emerged in the past decade or so and introduced new programs and reshaped the language of impact in Jewish Engagement. Both groups (and some that possess aspects of both) are represented in the JIG's Practitioner Council.

- **Data-Driven.** Institutions within the Jewish Engagement arena operate with differing levels of data-collection and assessment. While the JIG did not seek out Practitioner Council members that ignored data analysis, the research team made a conscious effort to invite agencies that The JIG invited agencies that varied when considering to data sophistication.

The Practitioner Council members involved in this testing the JIG Instrument were: Anti-Defamation League, AEPi, Career Up Now, Eli Talks, Shalom Hartman Institute of North America, Jewish Council on Urban Affairs, Jewish Council for Youth Services, Jewish Kids Groups, KAHAL, Masa Israel Journey, Oshman Family Jewish Community Center, and UJA Federation of Greater Toronto.

#### **Design and Purpose/Utility of Instrument**

The JIG Instrument, adapted from the Impact Genome Project, is designed to enable any organization—regardless of focus, depth or breadth of programming—to respond to detailed quantitative questions and input qualitative data about their discrete programs/interventions, down to the most granular level. The Instrument is arranged according to the four taxonomies that define all Genomes:

- **Outcomes** that programs in that social impact area are aiming to achieve.
- **Activities** that programs may use to achieve one or more outcomes.
- **Beneficiaries** that programs commonly serve; including characteristics such as age, gender, socioeconomic status, religious-cultural characteristics, etc.
- **Contexts** relevant to how programs are commonly delivered; this includes characteristics of the immediate and larger environments (e.g., instructional setting, location, and program size).

The data collected through the JIG Instrument helps facilitate the “conversations” between philanthropists and practitioners, centered around outcomes and impact. The Instrument can be utilized to streamline grant applications and annual reports. For the agencies, the Instrument will support internal assessment and program improvement. Currently, the JIG Instrument queries the knowledge of organization staff about program performance. The questions measuring desired impacts and program implementation, however, can and will be translated into qualitative and quantitative measures of outcomes for program beneficiaries through a catalogue and guide to common measurements and indicators in the field of Jewish engagement.

### **JIG Instrument Pretest**

In June 2019 the JIG Practitioner Council members pretested the JIG Instrument. Participating agencies provided information on a single program, usually their flagship intervention. Executive staff members from 13 diverse agencies in the Jewish Engagement arena participated in two private meetings facilitated by Zoom; the first to orient them to the Instrument and the second to provide feedback about their experience responding to quantitative and qualitative questions about one unique program in their portfolio. Council members were encouraged to involve any/all agency staff with development and program knowledge about the selected program.

During the orientation session, the JIG Senior Researcher facilitated a “screen share” to allow Council members to view the Instrument and familiarize themselves on the data that would be collected through the Instrument. Following the onboarding session, Council members received a link to the Instrument and guidelines for reviewing the Instrument for technical or methodological issues that arose as they completed the process. Council members were encouraged to take notes about their experience of responding to each question and look for ways to improve the Instrument. Up to two hours were recommended to complete the Instrument. After submission of responses, members provided both written and verbal feedback through email and a formal video or phone interview.

This report focuses on Council members’ impressions and reactions to the Instrument as a tool to help practitioners and philanthropists maximize impacts in the field of Jewish Engagement. It also includes a section of recommendations derived from the interview data. Specific technical and methodological issues identified and reported by the Council members have already been utilized to enhance the user experience.

### **Findings from the Pretest**

Practitioner Council members found the JIG Instrument to be accessible and manageable in terms of content and formatting. Every Council member provided valuable, nuanced input to refine question or response option wording and improve the usability of the online Instrument. At the same time, they believe the Instrument is thorough and enabled them to report the details of their selected program within each of the four taxonomies.

Several Council members reported stopping and restarting the process of completing the Instrument questions, a perceived benefit of the online data collection format. All reported that the Instrument took less than two hours to complete. Council members commented that the JIG process took significantly less time than grant applications they have submitted:

*“I can definitely see this [JIG] approach has the potential to streamline our grant process.”*

*“If we could complete one form and have the same data be accessible to the majority of our funders, that would save us time and money.”*

Council members can see the potential for the JIG Instrument as an important tool to educate staff, current and potential philanthropists, lay leadership, and other stakeholders about their unique programs:

*This [JIG Instrument] provided us with an opportunity to think through all the aspects of one program and create a consciousness around the relationship between the four areas [taxonomies]. We were forced to consider, ‘How does our context impact our beneficiaries and how does that relate to our outcomes?’ I can see the benefits for funders and taking this data and using it to present to our stakeholders at an annual meeting.*

*It was helpful to go through this process with our new director [of the program] so that we were all on the same page about the program’s design and delivery.*

Several Council members shared that the myriad of questions asked made them more aware of the kinds of data that could be relevant to philanthropists within and outside of the field of Jewish Engagement:

*Completing these questions made us think of things we do within our programs that we don’t typically highlight, but we could for other funders that might be interested in this. For example, a question about Israel/diaspora relations enabled us to think of something unintentional happening in our program that we may want to make intentional.*

*At first when I was going through the questions, I thought, ‘Why would anyone want to know this information?’ but then I thought, ‘Hey, maybe a funder would want be interested in some of the details that we take for granted?’*

Council members were cognizant of the potential benefits for streamlining grant applications and reports, if the JIG could be adopted field-wide. One Executive Director, whose organization implements hundreds of programs, discussed the benefits for her organization:

*What I found appealing about [the Genome model] is the simplicity of the idea and model and the ability to break through the noise of*

*doing different evaluations for every single intervention we oversee. By asking, 'What are the component parts that are likely to contribute to outcomes?', we can focus on and report on those for all our audiences. I believe this tool gives us the ability to tell donors what really works and what they should be investing in.*

Another Executive Director reported that she respects the Foundations that have invested in the first year of the JIG's work and believes that their endorsement of this effort has great value for the field of Jewish Engagement:

*I know this funder consortium understands the nature of start-ups and the need for investing in capacity building. It gives me hope for the field if they are onboard with this.*

While the majority of Council members believe that the JIG Instrument allows them to “tell the story” of their program, two members interviewed were not comfortable responding to questions in a survey format and found the quantitative questions potentially limiting to their development efforts. They expressed the sense that by quantifying and reducing the data into discreet questions and categories, the technology is diminishing the “power” of the story of their individual/ unique programs.

One Council member said that the questions were forcing him to describe his organization and the specific program in a, “siloe d way.” He explained that his program takes a holistic approach to Jewish Engagement, and he was unsure how the data would be received and interpreted. Another member felt that philanthropists would ignore all the detailed data the Instrument collects and, “simply do the math” and chose to fund the program with the lowest cost per beneficiary. Despite these concerns, both these members and others who pretested the Instrument acknowledged that there were many opportunities for additional data to be collected through open-ended questions and space to attach/insert documentation about the program, allowing for a more qualitative approach to development that some organizations desire. Furthermore, it should be stressed that the Genome does not aim to replace conversations and relationships between grantees and funders. To the contrary—the instrument is meant to provide the tools, background, and language through which funders and grantees can better articulate their visions and measurable definitions of success.

### **Field Recommendations**

The primary recommendation made by most Council members was to address the need to provide more context to the practitioners who will be asked to complete the Instrument. Specifically, they asked for a copy of all questions in advance of completing the online Instrument. Thinking of the process like a grant application, they noted the need to ensure they had access to the most up-to-date program details, including budgets and details of program delivery. For relatively smaller organizations on the Council, one person was able to complete all requested

data. For larger organizations, they needed to enlist input from various sources. In addition, Council members raised questions about who would be reviewing the collected data and for what purposes: Would it replace a grant application? Would it be used to satisfy reporting? Would this be used to assess impact among beneficiaries? As members of our Practitioners Council, they understand that the JIG is attempting to answer those questions as researchers look to implement the Instrument and leverage its methodologies in geographic and content-specific communities of Jewish Engagement.

The JIG has already utilized the input from our Practitioner’s Council members to strengthen the Instrument for practitioners and philanthropists. As the JIG moves the Instrument from pretesting to implementation, the research team will provide greater context and education to respondents. The smoother the data collection process will be, the more confident everyone will be in the resulting datasets.

### **Moving Forward**

One of the remaining hurdles for the Genome is to scaffold its taxonomies with benchmarks. To do this, the Genome is exploring opportunities to establish pilot early-adopter sites. The Genome Team is eager to partner with Jewish Federations and their agency ecosystems. Observing their role in stewarding Jewish life, the political scientist Daniel Elazar long ago referred to Federations as “polities.” In the past several decades, Jewish Federations have served as conveners, funders and incubators of Jewish Engagement programs.

The Jewish Impact Genome aims to leverage these relationships and semi-governing polities to (a) partner with agencies to align and further refine outcomes; (b) develop a catalogue of commonly-used and appropriate measurements and indicators of outcome attainment for use by nonprofits of all sizes; (c) help monitor program delivery; (d) build nonprofit capacity for data collection and predictive modeling; (e) and analyze and utilize data to convene substantive discussions on benchmarks in the various subsectors of Jewish Engagement.

Regionally sensitive ecosystems will also inform data relating to the Context Taxonomy. For this next phase of the JIG research, the Instrument will serve as a crucial diagnostic tool to help agencies articulate their impact and facilitate outcome alignment among alike organizations to better report and analyze data in each ecosystem.