In this issue, more than 50 authors write about the accomplishments of UJA-Federation of New York under the professional leadership of John Ruskay during the past ten years. The essays provoke us to respond to immediate challenges while also investing in the Jewish future. We hope this journal will provide lessons that will help all of us seize the moment to repair and renew our Jewish communities in Israel, New York, and around the world.
The Role of the Federation in Inspiring Research: A Case Study in New York

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In his 1999 inaugural address, John Ruskay lays out a vision for a caring, inspiring community and a strong, unified Jewish people (see the Appendix). Using the language of “experiment” and “adventure,” he evokes the dual prongs of the federation’s mission—to fulfill its historic responsibilities and to build community. During Ruskay’s tenure at UJA-Federation, the agency has extensively used research for the practical purposes of informing policy and planning. I would suggest that research should also be viewed as an adventure and source of inspiration. Research is not simply an aggregation of factoids and data points, but an opportunity for us to ask the “big questions” about Jewish identity, purpose, and community.

PRACTICAL RESEARCH

Federations have a grand vision of community and peoplehood, and their work has great emotional appeal. But the inner workings of federations—the commissions and task forces that concretize the vision and accomplish the work—operate within a rational decision-making model. Because this model depends on good and useful information, federations should continually engage in data gathering. This activity falls into three broad categories: demographic and marketing studies, needs assessment and evaluation research, and organization assessments.

Demographic and Marketing Studies

For many years, the community demographic study was the singular research of Jewish federations. These studies were often accompanied by so-called marketing studies, which consisted of interviews and focus groups with funders. As a package, the research served both major functions of federations: to raise and allocate funds. The demographic surveys were designed to show the size and shape of the population and identify service needs. The marketing surveys were intended to examine donor motivations. Through the federations’ elaborate processes for gathering and using data, the research also served as a mechanism for building community. Sum total, this research was a perfect match for federations.

The North American Jewish Databank houses 190 demographic studies conducted since 1950 in some 94 communities across the United States. One-fourth of the studies were done in the past decade, suggesting a continuing interest in such data. Only a few of the communities, New York among them, have...
put themselves on a regular diet of decentralization, giving them the added value of historical context and trend analyses.

Research can be judged by many standards, but the primary one for the demographic studies has been utility. The report of New York's most recent demographic study is clear on this point: "It is incumbent upon UJA-Federation, our network of agencies, and all others concerned with the important information found within this report, to join together and make use of the data to inform policy and communal planning" (Ukeles & Miller, 2004). Action followed rhetoric as UJA-Federation established a Research Department to answer inquiries about the results, run analyses, generate additional reports, and promote use of the study by planners in the federation itself and in agencies across the community. The 2002 community study became the most universally used UJA-Federation study, far exceeding expectations.

Needs Assessment and Evaluation Research

Until recently, Jewish federations and foundations were slow to embrace evaluation research as a cost of doing business, as they felt that any dollars expended should go to services and programs. Moreover, they did not understand the requirements for valid evaluation research and failed to appreciate, for example, the need for scientific samples and comparison groups.

The past decade has seen a shift in the philanthropic world that, in turn, has driven the push for evaluation research in federations. Increasing competition for funds coupled with losses in the financial markets have made donors, foundations, and federations ever more interested in knowing if their charitable dollars are making a difference (Edelsberg, 2004). Efforts have been made to educate federations, foundations, and their grantees on the characteristics of high-quality evaluation research, and expectations for such research have risen.

For its part, UJA-Federation has undertaken many evaluation studies and, in several instances, has used these within an action research framework. For example, when initial results from the study of JLearn (an adult educational program on Long Island) showed more change in participants' Jewish feelings than in their behaviors, the program was restructured to give added emphasis to behavioral change and to test notions of how to expand the program's impact (Grant & Schuster, 2003). When results from our research on Synagogue 2000 (S2K) in Westchester showed difficulties stemming from the slow pace and lack of clarity of the S2K process of synagogue renewal, UJA-Federation invested in more consultation to see whether individualized assistance could help accelerate the transformation effort (Sales, 2002).

In contrast to evaluation studies, which are conducted during or after a new program is implemented, marketing, feasibility, or needs assessment studies precede and presumably inform investment. Such studies are relatively rare in the federations, which tend to rely on demographic data for planning and evaluation data for re-planning. UJA-Federation has been exceptional in this regard, conducting, among others, a study of parents' perceptions of day schools (Insight Research Group, 2008), a study of the needs of those affected by autism (Ciporen, 2006), and studies on specific populations and social issues in Israel. These studies are intended to minimize risk in funding decisions and are important to the federation's rational decision-making process.
Organization Assessment

Occasionally, UJA-Federation turns the research lens on itself. The Caring Commission engaged graduate students at NYU's Wagner School to examine the nascent Partners in Caring initiative. The goal was to understand the successes, shortcomings, and future possibilities for creating connections between UJA-Federation's network agencies and the gateway institutions, such as a synagogue or community center, with which they were working.

In 2007, the Cohen Center for Modern Jewish Studies, along with the Foundation for Jewish Camp, was commissioned to look at the federation's Jewish summer camps. The questions were not simply evaluative (how well are the camps run? how strong is their Jewish program?) but also structural (would it be possible and desirable to create a camping system?). In 2004, the Network Commission asked me to examine the effectiveness of its newly redesigned process for reviewing its 100 agencies. The study not only looked at the costs and benefits of the process but also raised important questions about the relationship between the federation and the agencies and the relationship between organization review and federation allocations.

ADVENTUROUS RESEARCH

In the past decade, UJA-Federation has pushed the boundaries of research beyond these practical studies to more basic research about the Jewish world. I do not mean to suggest that this basic research is "impractical," but rather that it represents moments when the federation has stepped back from the press of daily needs to consider larger questions in Jewish existence. In these studies, data are important, but ideas and understanding are paramount.

Demographic surveys tend to be blunt instruments when it comes to understanding the psychology of Jews or the nuances of Jewish life. The 2002 survey, for example, gave estimates of the numbers of Russian-speaking Jews in New York but provided few sparks for conversation or action. To fill in the gaps, UJA-Federation commissioned a qualitative study of young Russian Jewish professionals. The report was replete with the verbatim thoughts and feelings of the participants about their hybridized identities (Russian, Jewish, and American) and their perceptions of the Jewish community. Unlike the numbers from the demographic study, these words provided powerful source material for the federation task forces working to engage this population.

In Connections and Journeys (Horowitz, 2000) or The Congregations of Westchester (Sales, 2004), UJA-Federation funded research on questions of Jewish identity and commitments without insisting that the findings relate to specific initiatives or policy. In both instances, results yielded new understandings of Jews and Jewish life. Connections and Journeys, for example, showed the complexity of Jewish identity in an ever spiraling analysis from 3 scales, to 7 patterns of identity, to 16 patterns of change over time. The specific categories were not the important part of the findings. Rather, the analysis overall pulled us away from simplistic notions of what it means to be Jewish and changed the conversation about what Jewish identity is and how we should study it.

The tone is also adventurous when UJA-Federation correctly wonders if it is making a difference. Atomistic study of individual programs shows the extent to which each is meeting its goals. However, the question remains whether the sum...
total of interventions is changing institutions, community, and contemporary Jewish life in the broader sense.

One approach to answering this question would be to increase synergy among the UJA-Federation’s various research projects by standardizing items, aggregating results, and conducting meta-analyses. The research we conducted on synagogue change efforts provides a useful example. In addition to using research results for evaluation and planning, the Synagogue Task Force held two “Synergy” conferences that brought researchers, consultants, and synagogue leadership together to discuss broad questions related to the strength of the synagogue. Assembling the pieces for the conference brought us closer to a program of research than the usual smattering of disparate studies (Sales, 2005).

INSPIRING RESEARCH

As noted above, the primary standard for federation research has been utility. I would suggest that we need to add the equally important criterion of inspiration. The double entendre of “inspiring research” is intended. As a key supporter and user of research, federations can inspire the research enterprise, working with their academic partners to raise meaningful, exciting questions. They can also take steps to assure that the research they commission inspires creative thought and action in the Jewish community. These steps include more synergy (as described earlier), wiser choices in topics, better research designs, and more open sourcing of results.

Wiser Choices

The Jewish community today suffers from the impetus to study everything. It needs to realize that not every program needs a full-scale evaluation. Some are more interesting than others, and yet yield higher dividends in terms of lessons learned, and contribute more significantly to the knowledge base. As well, some are “sacred cows” that will be funded regardless of evaluation results, removing yet another reason for a full-scale study.

Once a study is warranted, we face the challenge of what to ask. For my part, I have become a fan of logic models, although admittedly, developing them is difficult and time consuming. The logic model pushes consensus among funders, practitioners, and researchers about why the particular program is being funded and how it is to address the given problem or fulfill the vision of community. It clarifies the assumptions that underlie the work and the appropriate measures of process and outcomes. Most importantly, the model helps bridge theory and practice, enabling the research to contribute to both.

Better Designs

To fund research at appropriate levels, federations and foundations need to understand the requirements for achieving maximally valuable results. These include the development of adequate samples (with resources for enhancing response rates), inclusion of control groups, and longitudinal data gathering. Single time/single case designs limit not only the practical inferences we can draw from study results but also the breadth of understanding that we can derive from the work.
We need to continually increase the sophistication of the community’s understanding of research and of the researchers’ tools and methods. The most immediate need is for new methods for developing sampling frames for community demographic studies (Kadushin, Phillips, & Saxe, 2005; Phillips, 2007). Federation lists and random-digit dialing do not reach all segments of the Jewish population and thus do not produce a sample that represents the full community.

The time horizon for research has to be expanded. In my own research projects, I have found that grantors would wait as long as possible to test for results to maximize the likelihood of demonstrating outcomes. Federations have less patience as their lay volunteers and donors are eager to see results before renewing funding. I believe the tide of change is on the side of longitudinal research. Conclusions and journeys (albeit using retrospective accounts) convinced us of the value of viewing a Jew’s life over time.

Federations like New York, Boston, Miami, St. Paul, and Seattle that have maintained a regular schedule of community surveys have learned the value of time-series measurement. The research on the Birthingright generation is starting to yield results that will help us understand the life trajectories of a generational cohort (Saxe & Chazan, 2008). Such exemplars should encourage the community to support longitudinal research.

Open Sourcing

Until recently, most of UJA-Federation’s research reports were circulated only within the task forces that had commissioned them. When Jennifer Rosenberg became director of the Research Department in 2005, one of her first goals was to develop a central archive, a searchable database of all studies commissioned by the federation. The database currently holds some 150 research reports (from 2000–2009). More are yet to come.

Creation of the database immediately raised the question of whether all studies, regardless of their quality, should be included. The danger in excluding studies is that valuable learning may be lost. The danger in including all studies is that users may not be able to distinguish good work from flawed work. Solutions to this problem (e.g., a rating system) could well be applied here and at other archives being created in the Jewish world.

The database is intended primarily for UJA-Federation staff. Through the Berman Jewish Policy Archive,1 the federation is trying to release as many of its research reports as possible. Although some are openly available, others are designated for internal use only or are available only with permission. Our study of the Network Commission, for example, is currently secured for internal use only. On the one hand, the reasons for not publicizing critical discussion of UJA-Federation’s processes are understandable. On the other hand, the report offers insight into the complex relationship between a federation and its constituent agencies that would be of value to other federations and to students preparing to become communal leaders. Despite the rationale for a tiered system, it may not last long with the growing public expectations of transparency and easy access to data.
CONCLUSION
The organizations that will survive and thrive in today’s highly fluid, competitive environment will be those that know how to use information and develop ideas. Both capacities are critical. And to that end, we need research that is both useful and inspiring.

To date, UJA-Federation has generated research that has informed decision making within the federation and has contributed to the public discourse about contemporary Jewish life. To continue in this role, it will need to be part of the evolution of the research enterprise—encouraging programs of research, asking ever more challenging questions, updating methods, and making results universally available.

Ten years ago, John Ruskay set forth a challenging agenda for the community and did so with a spirit of experimentation and adventure. Research, to me, is just such an adventure. Each study—whether on synagogues, Jewish education, social welfare, or the inner workings of the federation—is an exploration. Occasionally there is little payoff, but most often a treasure is found—the nugget of truth, the new understanding, the “aha moment.” The discovery is always just the beginning of the adventure, as collectively we strive to assure that the data inspire new ideas and action.

REFERENCES