

“AAA” Guide to Developing and Using Knowledge to Drive Jewish Communal Policy

Leonard Saxe and Fern Chertok

The ability of Jewish communal organizations to adapt successfully to the ever-changing landscape of Jewish life rests, in part, on their capacity to develop and use knowledge. Just as major societal institutions in the fields of economics, education, health care, and social welfare are increasingly knowledge-driven, so too must the organizations that serve the Jewish community develop and institutionalize strategies for generating and using knowledge effectively. Jewish communal decision making needs to be evidence-based, but in ways that are congruent with Jewish values. In other words, to be knowledge-driven in a Jewish context is not simply to use data but also to seek both the surface and the more nuanced meaning from information and, perhaps even more importantly, to collaborate in its development and interpretation.

At the 1947 national conference of the Jewish Communal Service Association of North America, Kurt Lewin, a Jewish émigré from Germany and the leading social psychologist of his era (Saxe, 2010), urged the field of Jewish education to “instigate a serious program of action-research” (p. 296). Lewin was calling for cooperation between practitioners and social scientists in using rigorous research design, broad data collection, and critical synthesis in the service of developing not only evidence-based best practices but also a better understanding of the process and context of Jewish education more broadly (Lewin, 1946). In the ensuing years the fields of secular education, public health, and medicine were transformed by this type of research program. By contrast, decision making about Jewish communal policy continues to be characterized by a process in which intuition and anecdotes are all too often privileged over systematic, high-quality information; Lewin’s concern that the Jewish community would be “the last to avail itself of this vehicle [research]” has unfortunately proved prophetic.

It is not that Jewish organizations have totally ignored the uses of data. To the contrary, a plethora of evaluation studies have been conducted to assess whether specific programs yield desired outcomes. Evaluation studies clearly have importance for local decision making and practice, and they also have the potential to provide useful insights to the larger community. Unfortunately, many if not most of these studies are never disseminated, and even when they are made public, the generalizability of their findings is limited by the specificity of the context, program, and individuals studied. Substantial resources have also been

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invested in socio-demographic studies that provide estimates of the number of Jews and describe the characteristics of American Jewry (see Saxe & Tighe, in press). But socio-demographic studies are exceedingly difficult and expensive to conduct, and although they tell us about what is, they provide little information about why or what could be.

Perhaps the most problematic aspect of the current situation is the limited use of research to answer the most fundamental and broadest questions facing the Jewish community. For example, how does Jewish identity relate to other aspects of the individual's sense of self, change over the lifespan, and manifest in behavior, organizational affiliation, and communal participation? What is needed is a commitment to developing a reservoir of knowledge that can serve as the foundation for policy development and assessment.

The limited role of research and knowledge cultivation in Jewish communal policy making is the result of a host of factors, but it is also an understandable although problematic human reaction to the complexity of the issues at hand (see Kahneman, Lovallo, & Sibony, 2011). As much as we seek to be rational beings, we are also wired to have cognitive biases that simplify our perceptions. Thus, for example, confirmation bias leads us to discount data that run contrary to our understanding of a situation, status quo bias causes a preference for the current state, and anchoring bias results in overweighting of certain pieces of information or cases even when unrepresentative of the overall situation (Kahneman, Knetsch & Thaler, 1991; Kahneman, Lovallo, & Sibony, 2011; Samuelson & Zeckhauser, 1988). For example, the finding from the 1990 National Jewish Population Survey (Kosmin et al., 1991) of a 52% intermarriage rate became the focus of intense communal discussion. Findings about differences in Jewish involvement between intermarried and in-married households reaffirmed the communal narrative that intermarriage was the primary cause of disengagement with Jewish life. However, this narrow perspective ignored the critical role of important socializing experiences such as Jewish education, Jewish peer networks, and exposure to home ritual in determining adult Jewish engagement (Chertok, Phillips & Saxe, 2008).

In the Jewish community, where communal engagement is an important value, we are also very social in how we make judgments. "Crowd sourcing" is a new term, but it describes the way in which many Jewish organizations traditionally function. The term refers to the informal gathering of information and the assumption that many voices can produce better judgments than a few (Surowiecki, 2004). Although crowd sourcing has been used successfully in gathering and analyzing data in the natural sciences (e.g., the Citizen Scientists program of the Adler Planetarium), the "wisdom of crowds" is predicated on access to very large numbers of informants. By contrast, most Jewish communal policy makers, especially on the local level, have access to only small circles of informants.

Jewish communal decision makers, like those in many other fields, are also prone to reactive policy making in response to crises or perceived threats to continuity—situations that inhibit the use of evidence-based practice (Jack et al., 2010). For example, the finding, cited earlier from the 1990 National Jewish Population Survey (Kosmin et al., 1991) indicating that 52% of current marriages among American Jewish were to non-Jews, led to the rapid development of several streams of intervention based on commonly held opinions among

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communal leaders but also on a limited and, in some important respects, misleading understanding of the situation.

The Jewish community is too large, diverse, and complex—and the questions it faces are too important—not to adapt the techniques of cutting-edge fields and use state-of-the-art paradigms for knowledge creation and utilization. Well-conceived, conducted, and analyzed research is an antidote to our individual cognitive biases and the limitations of crowd sourcing. It helps ensure that we understand the texture and nuance of the issues we face. In this article we outline a process for moving the Jewish community toward a rigorous evidence-based approach to communal planning and practice. We explore how the systematic development of questions, design of data collection, and analysis coupled with synthesis can guard against allowing our predilections to become our predictions.

THE THREE A'S OF KNOWLEDGE CREATION AND USE

Becoming a knowledge-driven community that embeds research—conceived of broadly as knowledge development—into policy making requires more than a commitment to collecting and using data: It is a process. In this section, we describe a three-step process: Asking (the right) questions, Answering questions (well), and Amalgamating and disseminating findings. As a shorthand, we refer to these as the three “A’s” of knowledge creation and use. We understand that reducing this process to three steps is a rhetorical simplification. Each step includes numerous tasks, and the process is not necessarily linear. A dynamic process of knowledge creation and use will go back and forth between idea development, design, and analysis/synthesis.

Asking (the Right) Questions

One of the hallmarks of a systematic approach to the development and use of knowledge is to animate the process by formulating a rich set of questions. At the broadest level, the questions are about our “theory of the problem” (Gottfredson, 1984). What is the nature of the problem, why does it exist, what are its origins, and what would the situation be like if this problem were not present? More narrowly, the questions are about the rationale and outcomes of specific policies or programs. Although it might be easier to shape questions around the data at hand, what is often needed is information that is not already part of our communal or organizational repertoire and experience.

As noted earlier, socio-demographic studies consume a large portion of communal research resources. Their focus has been on the size of the population, its characteristics, and the level of engagement. Implicit has been the question of whether the population is growing or shrinking and whether certain characteristics (e.g., intermarriage) are increasing or decreasing. However, the most important questions facing the Jewish community may not be about population size, but instead relate to the nature of Jewish engagement. For example, if one is interested in increasing the penetration of day schools, it may be less important that a community has 10,000 or 11,000 children and more critical that we understand the barriers that keep the vast majority of parents from choosing day school enrollment for their children.

It should be clear that the process of question generation and setting the research agenda cannot be accomplished singlehandedly by the researchers or

individuals specifically tasked to develop knowledge. Identifying and refining researchable questions requires the explicit and ongoing input of policy makers and practitioners. Studies on utilization of research in fields as diverse as agriculture, education, and medical care demonstrate that early and ongoing involvement of decision makers is the best predictor of research use (Dobbins et al., 2002; Jack et al., 2010). Policy makers are most likely to simply ignore research findings when they seem out of step with perceived policy needs (Blewden, Carroll, & Witten, 2010).

In many ways the proposed system begins and ends with bringing to the forefront and building consensus around the major questions to be researched. One of the critical components of the system for knowledge generation that we are proposing is to institutionalize the surfacing of key areas of knowledge need into communal policy making. This might be accomplished by using communal forums such as the General Assembly to hold “hearings” on what questions are most pressing or by tasking topic-based work groups, composed of researchers and practitioners, to do the same.

Answering Questions (Well)

Maimonides (1904), in the *Guide for the Perplexed*, famously wrote, “Truth does not become more true by virtue of the fact that the entire world agrees with it, nor less so even if the whole world disagrees with it.” In part, the rationale for conducting systematic research is to guard against assuming that the most popular policy is the most effective one, and vice versa. From the Maimonidean perspective, science is the “knowledge of ultimate and proximate causes, which one must investigate to know anything” (Kravitz & Olitzky, 1999, p. 18). Investigating questions about Jewish communal policy is a search for causes and, necessarily, involves using multiple sources of information considered from multiple perspectives.

In this search for answers, it is important to note that the quality of information is more important than the quantity. A study of the experience of a few hundred individuals carefully sampled and explored in depth may be more valuable than research that gathers brief and surface information from thousands. How one goes about answering questions—in other words, how they are operationalized in research design choices—is critical. Although sometimes issues of research design are seen as the concern only of academicians and as immaterial to the use of data, in fact, how one conducts the search for answers is as important as the questions themselves and determines the purposes for which results of any study can be used. Several considerations apply to developing data that can be used for policy and program development.

1. What is the reason for the effects we observe? Based on the design of the study, can we infer the cause or do the findings merely suggest that there is a relationship between the outcomes? For example, the impact of Jewish education has typically been studied by nonexperimental research designs, where we look at the same people over time. But these designs do not allow one to assess the effect of selection (differences between families that choose to send their children for different amounts of, or no, Jewish education). If the questions are truly about causal mechanisms—and they often are because we want to determine if investing in a particular type of program yields results—we need more than descriptive

research. We need comparative research that allows us to estimate how participants might have changed had there been no program (Morgan & Winship, 2007) and to compare how these changes play out over time.

2. What is the active ingredient? If we find effects, can we tell what program factors are responsible for this impact? If a study of Israel experience programs indicates that participants have stronger Jewish identities and are more likely to be engaged with Israel afterward, what is the key ingredient that led to this change? Is the change due to having an immersive experience with Jewish peers, is it about the educational content, or is it the result of the unique experience of Israel? Without developing an understanding of the “theory” of a program, we are left with “black box” interventions, a term borrowed from engineering to describe a type of program model in which we know the inputs entering the system and how they are expected to look after exiting, but the processes by which inputs are transformed into outputs is metaphorically hidden from view within the opaque box (Bateson, 1972). Understanding the theory of a program is one of the most difficult tasks of research, but it also has the greatest potential to improve programs and policy.

3. To whom do the results of the study apply? Research is always a “snapshot” of a specific group at a particular time. A key research issue is our ability to generalize beyond the individuals or groups that are studied. Thus, for example, one might want to learn about what motivates young donors to give to Jewish or non-Jewish causes. Depending on when the research is done—for instance, a period of economic prosperity versus a period of economic instability—the results may differ. Motivation for Jewish philanthropy may be different for wealthy than for less wealthy donors, and particularly among young leaders, their age, stage in career, and family status may interact with their giving patterns. No program of research is completely comprehensive, but understanding the limits of generalizability of each study tells us how complete our understanding of the issue is.

Answering questions well—understanding causal factors, their applicability, and their meaning—is critical to building a body of knowledge about policy issues. Doing so can be technically complex and thus often requires specific research expertise. But the process also requires collaboration between researchers and policy makers to assure that the knowledge is useful and applicable. Research cannot be conducted in a policy vacuum, just as policy making should be built on a foundation of research-generated knowledge.

Amalgamating and Disseminating Findings

Asking the right questions and answering them well are necessary conditions for developing a knowledge-driven method of policy and program development, but they are not sufficient to make the process effective. Research has to be synthesized for it to be effective as a tool for improving practice. In health care and education settings increasingly, evidence-based practice has advanced by combining the results across small studies to broaden the diversity of participants and interventions. One example in the Jewish communal arena is our effort to develop more precise estimates of the size of the U.S. Jewish population (Saxe & Tighe, in press; Tighe et al., 2011). Most studies of U.S. residents are too small to capture the approximately 2% of the population that identifies as Jewish by

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religion. By combining data from multiple studies one can obtain a more precise estimate.

There is another element in the amalgamation process, which requires review and assessment of findings as they relate to policy. At a basic level, it requires systematic reviews of available knowledge. But it can also mean assembling what have been called “consensus panels,” which are groups of experts gathered to assess the available evidence on a particular problem. Consensus panels have rarely been used in the Jewish communal world, but are a hallmark of the development of health and educational policy. Passage of the *No Child Left Behind Act of 2001* was groundbreaking for American educational policy in part because it required the use of scientifically based instructional methods. In the area of reading, the challenge of discerning what methods were sufficiently evidence-based was aided by the work of the National Reading Panel (NRP), constituted in 1997 to assess research-based knowledge of methods of teaching children to read. Consensus panels, such as the NRP, are charged with the dual task of evaluating and synthesizing findings from multiple research sources.

The first role of consensus panels is to vet individual studies to determine the extent to which their design and analysis use systematic empirical methods, comport with standards of validity and reliability, and justify their stated conclusions. If all studies, regardless of scope and relative claims to validity, are given equal valence in crafting the messages to be gleaned from the research, then there is no form of quality control (Weiss, 1979). In other words, what credence should be given to the results of each study? In the academic arena, this role is carried out by independent, peer-reviewed journals, and publication is seen as the imprimatur of the field. Unfortunately, research related to Jewish communal decision making is typically published without peer review, and even when published in scientific journals, the lag time is often out of sync with policy needs.

Syntheses and review panels can also highlight and focus communal attention on the themes that emerge across studies so that appropriate policy and programs can be developed. Too often, the hope is that a new study will provide definitive answers, and funders often want a study conducted in their particular setting. However, “big bang” studies that fully capture the phenomenon of interest and completely discount competing hypotheses are rare. It is far more typical for research knowledge to progress through a “reservoir” model in which the results of a number of studies accrete over time to form a more complete picture (Gold, 2009). One wonders if the development of successful communal initiatives, such as Taglit-Birthright Israel, might be accelerated by learning across studies through the synthesizing function of consensus panels.

The goal of the accumulation and assessment process is to develop usable knowledge. That requires a clear strategy for dissemination. Explicit attention needs to be paid to strategies for fostering the penetration of research findings into the policy-making and practice communities. Other fields of action research, most notably agriculture, make use of boundary organizations and roles such as the extension worker who act as intermediaries between science and end-users (Cash, 2001). Boundary-spanning organizations or figures serve as translators between research teams and the policy makers, forging two-way communication (Gold, 2009; Inkpen & Tsang, 2005). In a circular path of influence, boundary organizations also allow end-users to give input into the topics to be researched.

CONCLUSIONS

Brandeis once said that “the logic of words should yield to the logic of realities.” This special issue of the *Journal of Jewish Communal Service* is filled with intriguing and potentially important ideas for transforming the communal landscape. But it is unlikely that all of them will be successful in practice, regardless of the power of the case made for them or how fervently they are promoted. The meta-idea proposed here is to develop a systematic approach to decision making about these ideas that is based on their scientifically demonstrated efficacy. We can make a strong data-based case for this innovation based on the experience of policy fields as diverse as education, medicine, and agriculture. Just as evidence-based practice has become the norm in the field of medicine, so too should it become normative in the Jewish communal world. We can launch this idea by scheduling forums at the next General Assembly to develop consensus about which areas of knowledge development are most pressing. This would be followed up with the establishment of task force groups for the top priority areas of knowledge development. These groups would then be tasked with further articulation of the research questions that need to be answered and critical review and synthesis of the existing research in their topic area.

Will an emphasis on evidence and rigorous methodological testing stifle creativity and innovation? In fact, we believe it will have just the opposite effect. A focus on question-asking should simulate creative thinking, and testing, particularly if it is directed to the development of demonstration projects, ensures that creative ideas will receive a platform on which they can be evaluated. Too often, creative impulses are stifled because we cannot be assured that they will be successful. Adopting an experimental research attitude will allow them to be tried. In the same way, an emphasis on aggregation will ensure that we learn from the experiments we conduct. There is perhaps more to be learned from our failures than our successes, but only if we assess them well and consider them in comparison to alternative approaches.

Wisdom is a Jewish value, and a search for truth is one of our central tasks. However, wisdom and knowledge alone will not enhance the effectiveness of Jewish communal organizations nor singlehandedly improve programs and policy. Knowledge is but one ingredient in the mix of social and political forces that affect Jewish communal and organizational success. Our three “A”s to creating a knowledge-driven organization are designed to improve the chances that we can generate and use information to ensure a vibrant future.

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