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Blank, Adrianne. Pathways: A Guide for Evaluation Programs in Jewish Settings, 1998.

PATHWAYS

A Guide For Evaluating Programs In Jewish Settings

Adrianne Bank, Ph.D.

Mandell L. Berman Jewish Heritage Center for Research and Evaluation in Jewish Education at JESNA

עת לעשות Time to Act

CIJE Council for Initiatives in Jewish Education

Published with the support of THE JACOB AND HILDA BLAUSTEIN FOUNDATION

The generous support
of this publication by

***The Jacob and Hilda
Blaustein Foundation***

is gratefully acknowledged.

Publication of *Pathways* is the result of a partnership between The Council for Initiatives in Jewish Education (CIJE) and The Jewish Education Service of North America, Inc. (JESNA).

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Preface

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About This *Guide*

"Was it successful?"
"Did it work?"
"Did it accomplish its goals?"
"How should it be fixed?"
"Should it be expanded?"

These are a few of the questions that people involved with organizing events, workshops, conferences, classes or trips ask themselves and one another at the conclusion of their efforts.

For the purposes of this guidebook, the "it" in these five questions refers to **programs.** Those asking the questions may either be the people responsible for delivering programs, here called **program providers**; or they may be those responsible for endorsing or funding the program, here called **policy makers** or **program funders.** The process by which the questions get answered is here called **program evaluation.** And the places where all this is happening — such as federations, synagogues, schools, organizations and agencies — are here called **Jewish settings.**

Pathways is intended as an introductory *Guide* for program providers, policy makers and program funders to the twists and turns of doing program evaluation in the energetic environment of the contemporary American Jewish community.

This *Guide* is divided into nine chapters. The first discusses the range of programs currently being developed in the Jewish community and sketches the state of program evaluation in relation to them. The next five chapters deal with generic aspects of program evaluation. Much of the content in these chapters is derived from the writings and experience of educational evaluators, particularly those at the Center for the Study of Evaluation at the University of California, Los Angeles who work with programs in schools or non-profit institutions.

Based on many years of doing evaluations in the Jewish community, I have adapted these ideas to fit the needs and circumstances of programs in Jewish settings. My work with Bureaus of Jewish Education, Federations, synagogues, schools and Jewish foundations, and, especially, with the Whizin Institute on Jewish Family Education — doing program evaluations and helping others to think about doing them — has enabled me to translate from the academic to the practical, from the scholarly to the every-day, and from the ideal to the possible. These evaluation activities have provided me with a bird's-eye view of the many programmatic initiatives in the American Jewish world today.

The last three chapters of the *Guide* present examples, from my experience and that of others, in evaluating different types of Jewish programs and are a beginning effort to summarize what is going on in particular areas. Evaluation activities in each area could easily be expanded into separate monographs. The very last chapter lists the references used in preparing this *Guide.*

You should be aware that the field of evaluation has many unresolved issues and challenges. Each evaluator, while familiar with the literature in the entire field, usually works from his or her own perspectives and experiences. This *Guide,* therefore, is infused by my assumptions about evaluation, among them:

- **The value of program evaluation does not lie in any claim it may have to scientific objectivity.** Program evaluations cannot eliminate the subjective and the personal in determining the value of a program. Program evaluations invariably contain elements of the subjective, the personal, and the situational because they are performed by real people operating in the complexity of real settings. **The value of evaluations is that they ask important questions about programs and use systematic and fair methods to get plausible answers, which then can be used to make decisions.**

- **Evaluation is a set of attitudes even more than it is a set of techniques.** Doing good program evaluation depends on people's interest in hearing many points of view, their ability to distill such information so as to make sound decisions, and their openness to learning from experience.
- **Evaluation means asking questions that will lead to improving programs in a conscious, systematic manner.** Program evaluation runs alongside the program itself, hand-in-hand. Evaluation planning starts at the same time as program planning and usually concludes sometime after the end of the program.
- **Program evaluations can be done in a variety of ways.** These range from informal, inexpensive, in-house collecting of information and decision-making to more formal, well-funded, larger scale, and more technically elegant data collection and analysis designs requiring sophisticated evaluation expertise.
- **Decisions about how to do program evaluations should always be made relative to who wants the evaluation, what information they find credible, and what use they will make of the evaluation.** Sometimes the intended use of evaluative information is formative — to improve the quality of the program by making changes in it. Sometimes the intended use of evaluative information is summative — to assess the merit or the worth of the program so as to determine whether it should be discontinued, continued, or expanded. There are, as well, many other uses for evaluation.

Over the many years that I have been involved with evaluation activities, I have found that I think about evaluation, talk about evaluation, and do evaluations somewhat differently, depending on the people I am with and the circumstances of the program. Every time I have become involved with a program and its evaluation, I have learned something I had not known before.

So, I have tried to write this *Guide* as if I were having a conversation with you. Sometimes the conversation may touch upon epistemological matters, such as how we know what we know. At other times, the conversation might turn towards interpersonal relationships, and how to negotiate consensus among the various people — here referred to as "stakeholders" — who have particular interests in a program and, therefore, have particular agendas. At still other times, we might discuss the intricacies of running a focus group. None of these conversations are complete; they are, rather, the opening paragraphs in matters which require further elaboration.

If I have been successful in imagining our conversations, the separate chapters of the *Guide* not only will address your specific needs, but will also fit together into a coherent view of program evaluation as it could be conducted in the Jewish community today.

A Note to the Reader

You may be reading this *Guide* as a professional or a lay person responsible for creating and delivering programs in the Jewish community. **You may be a program provider.** Your motivation for thinking about evaluation may be that you want to know whether the programs you are involved with are working as well as you had hoped they would.

Or, you may be reading this *Guide* from the point of view of a donor or a foundation project director who wants evaluations in order to find out how well the programs initiated or supported by your dollars are paying off in terms of your own goals. That is, you may be a **program funder**.

Or, you may be coming to this *Guide* as a person on the board of a synagogue, a school, or another Jewish institution who wants an evaluation so that you can make up your mind as to whether the programs you have endorsed should be continued, modified, or terminated. You may be a **policy maker**.

Or, you may be reading this *Guide* because you are curious about evaluation in general, or about specific issues.

My hope is that you will find what you want. As you become intrigued with the potentialities and payoffs of program evaluation, you may return to the *Guide* to locate the information you need for taking the next step. Perhaps, you might do further reading in the subject from books suggested in the References.

Very few people will read this *Guide* from beginning to end. You may want to start by skimming it and reviewing the figures and the examples.

If you like overviews, start with the early chapter on Program Evaluation and the Jewish Community which discusses the present state of evaluation in the Jewish community. If you are involved with organizing a program evaluation in the near future, look over Chapters 2, 3, and 4 for guidance. If you are interested in evaluation in specific areas of Jewish programming, you may find what you want in Chapter 7 or 8. Also, some of the issues in Chapter 9 may be relevant. If you are primarily interested in collecting data from participants, Chapter 4 may provide you with some new ideas. Chapters 5 and 6 offer guidance in developing instruments and analyzing the results. If it is successful, and if it works, this *Guide* will help you understand the benefits and challenges of evaluation.

Acknowledgments

I would like to thank Adam Gamoran and Ellen Goldring of CIJE for providing me the opportunity to write this evaluation guide. Steven Chervin, Barbara Neufield, and Susan Stodolsky reviewed early drafts and made invaluable suggestions which transformed both structure and content. Students, especially Lisa Bales, in the Cleveland Fellows - Whizin Colloquium on Research and Evaluation in Jewish Family Education helped greatly in grounding the examples in real life. So have all my colleagues at the Whizin Institute for Jewish Family Education, most particularly my friend and mentor Ron Wolfson. I want especially to acknowledge and thank Isa Aron, Leora Isaacs, Vicky Kelman, Jeffrey Schein, and Susan Shevitz — good friends who patiently informed me about Jewish education for many years — for their time and attention in helping to fine-tune this effort. Bill Robinson of CIJE did an outstanding job of formatting an initial version. Leora Isaacs of JESNA shepherded the final version through production with wit, warmth and wisdom and I am very grateful to her for that.

Program Evaluation and the Jewish Community

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Program Evaluation and the Jewish Community

Programs in the Jewish Community

In recent years, the American Jewish community has seen an explosion of programs in a variety of areas.

The energy unleashed by the "wake-up call" of the 1990 National Population Study, which documented high levels of both assimilation and diversity in the Jewish community, has resulted in both large and small initiatives on the part of Federations, synagogues, schools, youth groups, Hillels, camps, Jewish Community Centers, Jewish Family Services, and other organizations, such as B'nai B'rith, Hadassah, and the National Council of Jewish Women.

The overall purpose of these programs has been to reach, touch, and influence the many different kinds of people who make up the Jewish population of America. However, each program has its own goals and objectives and is carried out by program providers within a specific setting and with a particular population.

For example, in many cities, Federations and Bureaus of Jewish Education are making grants to synagogues for self-directed change projects or for new initiatives in broadly defined areas, such as outreach to marginally or unaffiliated individuals, outreach to newly-arrived immigrants, outreach to interfaith families, youth programs, or adult education programs.

Community and family foundations are supporting teacher training, curriculum development and family education projects in day schools and afternoon schools. Teen trips to Israel are being supplemented by pre- and post trip programming.

Many of these programs and projects are using increasingly sophisticated management tools including advertising, public relations, cause marketing, inter-institutional partnerships. strategic planning, Web pages and teleconferencing.

Those involved in designing and promoting these efforts are filled with optimism and enthusiasm. They believe that these experiments are likely to be the wellspring of 21st century American Jewish revitalization.

Program Evaluation in the Jewish Community

Because we are living in this era of change and active experimentation, we are not exactly sure of "what will work." New programs represent the "best guesses" of program providers, funders and policy makers as to what will reach this generation of American Jews. In order for us to distill the maximum learning from all these experiments, some form of program evaluation is essential.

Thus, there is a greater imperative to do program evaluation now than there was in the past. In the past, synagogues and schools and agencies appealed to a population with known characteristics. Common sense and previous experiences were enough to create successful programs. Everyone was operating in familiar territory.

Now, the territory is not so familiar. Program providers, policy makers and funders who function within the affiliated Jewish community may not be well attuned to those who are unaffiliated. The older generation may not be able to readily intuit the needs of a younger population.

For example...

- ▲ we may not know, for sure, what will attract pre-school parents to Jewish family education programs
- ▲ we may not know, for sure, how to link rural Jewish teens with the rabbi, via E-mail and chat lines
- ▲ we may not know, for sure, how to help new Americans from the former Soviet Union become more Jewish
- ▲ we may not know, for sure, how to develop in-the-dorm Shabbat dinners for college students

At first, we mount such programs by trial and error. We learn how to do them by doing them. Program evaluations can cut down on our learning time, and make us more effective more efficiently.

But many in the Jewish community are not yet convinced of this. Program evaluations have not yet become standard practice. While applauded in concept, funders and policy makers rarely make sufficient dollars available for evaluation. And program providers secretly worry about having their mistakes made visible. And, at the present time, there are too few skilled evaluators available, too few training programs in evaluation, too few mechanisms for dissemination of evaluation findings.

But the trend is in the right direction. The value added by evaluation is becoming more apparent. The benefits to be accrued from program evaluation for the entire community are becoming better understood and appreciated. Among such benefits are:

- ▲ increased awareness of the diversity of the American Jewish population
- ▲ greater knowledge of how to appeal to different populations
- ▲ improved techniques for delivering high quality, well-managed programs
- ▲ greater capacity to positively affect the participants in a program
- ▲ increased ability to engage program participants as active partners rather than as passive audiences

Evaluation Overview

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Evaluation Overview

The Emerging Evaluation Paradigm

In the last chapter, we indicated that evaluation is fast becoming a necessary element in developing and delivering programs because it is a way to improve or expand such programs.

Earlier thinking about program evaluation was dominated by concerns with accountability. Program funders and program policy makers set up evaluations to ensure that money was spent as they intended, and that the outcomes of the program justified the expenses of the program.

Today, when we are less sure that we know how to devise programs to meet new needs and we want to encourage fruitful experimentation, program funders, program policy makers, and program providers must be partners in working together. Evaluations should be seen as an organized form of working together.

The emerging evaluation paradigm, then, starts with a trust among program partners in one another's good faith. In this new way of thinking, evaluation is an enterprise equally valued by everyone and not something that someone in one role does to someone else in another role. Evaluation is regarded as an essential part of everyone's learning.

Three Approaches to Program Evaluation: Non-formal, Informal and Formal

We can distinguish three different approaches to evaluation.

Non-Formal: Non-formal evaluation is that which we do normally in the course of daily life as we make judgments about people and events. Non-formal program evaluation occurs when someone says to someone else "I had a good time," "That seemed to go really well," or "I don't think they are doing the right thing." Non-formal evaluation of programs happens when we — whether we are participants, program providers, or program funders — react reflexively out of our own perceptions and biases. It usually occurs spontaneously. As a program provider, we may not plan for or consciously seek such feedback, but we listen when it is offered. As a program participant, we might not analyze our reactions. We just talk. As a program policy maker, we may not make considered and comprehensive judgments. We just react.

Informal: By contrast, informal evaluation is what we do when we intentionally set out to learn from experience and bring some level of analysis to what we see and hear from others. Although we use this approach in many circumstances, we are referring specifically to doing informal program evaluation when trying to learn what works and what doesn't work about small or start-up programs.

Informal program evaluation usually relies on post-program analysis by program providers plus oral or written feedback from participants. Doing informal program evaluation is inexpensive. It does not require careful research designs nor pilot-tested instruments. But, informal program evaluation is not free. Its costs are in program providers' and participants' time —

time spent discussing, analyzing, and debriefing after a program. Also, informal program evaluation, while not relying on technical expertise in data collection and analysis, does require of those engaged in it an open attitude, skills in "listening for" issues raised by others, talent in synthesizing information from many sources, and the ability to make judgments about appropriate next steps. Informal program evaluation requires intention and attention, both of which can be improved upon by practice.

Formal: The third approach presented in this *Guide* is formal evaluation. When we do formal program evaluation, the planning of the evaluation requires the same careful thought as the planning of the program. In fact, the formulation and framing of evaluative questions — one of the critical steps in doing a formal evaluation — helps to clarify the intentions as well as the operations of the program. For example, evaluative questions such as "How will we know whether the program is a success?" or "What can we look at as indicators of program impact?" or "What do we expect in the way of participant changes as a result of the program?" often stimulate the restatement of program goals or produce new ideas for program activities.

Unlike informal evaluations, where surveys, interviews, and evaluative go-rounds are created by those running the program, in formal evaluations the development of instruments for data collection and the data analysis effort evaluations should be guided by someone knowledgeable about these matters. (see figure 2)

Figure 1

THE EMERGING EVALUATION PARADIGM

OLD WAYS OF THINKING

1. Evaluation is imposed on a program by outsiders.
2. Evaluation is needed to make sure that funds have not been misappropriated or misspent.
3. Evaluation is done at the end of a program.
4. Evaluation findings are seldom integrated into an organization's ongoing decision making and planning.
5. Resistance to evaluation comes from fear that negative evaluative findings will lead to loss of funding.
6. Evaluation takes time away from the real work of the program or organization.
7. Evaluation must be statistical to be valid. Perceptions do not count.
8. Evaluation must always be done by an impartial arms-length evaluator.

NEW WAYS OF THINKING

1. Evaluation is seen as important by insiders.
2. Evaluation looks at implementation as well as impacts.
3. Evaluation begins as a program is planned and continues throughout the life of the program.
4. Evaluation is viewed as organizational learning — a way to fine-tune its work.
5. Evaluation is a developmental process, not a report card process. There is a problem-solving relationship between grantors and grantees.
6. Evaluation is essential to the real work of the program or organization.
7. Evaluation may be done by different methods, matched to audiences' needs for credible, persuasive findings.
8. Evaluation is everybody's job.

Figure 2

THREE APPROACHES TO PROGRAM EVALUATIONS NON-FORMAL, INFORMAL AND FORMAL

	NON-FORMAL	INFORMAL	FORMAL
Relevant Program Characteristics	• very small • one time only • first time through	• start-up or pilot • multi-session	• well-formulated with clear purpose • goals or expected outcomes • conceptual rationale • stable structure • likely to be transported or replicated • well-funded • multi-site
Pre-Requisite For Evaluation	• personal willingness to learn from experience • openess to feedback	• personal willingness to learn from experience • atmosphere of trust • evaluative questions • skill in soliciting feedback from participants • skill in analyzing and synthesizing feedback • ability to make judgements about appropriate changes • ability to communicate about such changes • resources for materials • time to engage in pre- and post-program evaluation activities	• program readiness in terms of above characteristics • evaluation readiness: sufficient trust/ time/money/skill/stakeholder buy-in • rationale and purpose for evaluation • evaluation questions • plan for collecting data: instruments, sample, schedule • plan for analysis and and formulation of findings • plan for communicating and taking action • resources of time, money and skill
Framework for Evaluation	• concurrent with program • little additional cost	• pre-program intention to evaluate • evaluative awareness while conducting program • solicitation of participant and peer feedback • costs of up to $2000	• concurrent and integrated program and evaluation planning • data collection before, during, and after program, along with follow-up costs starting at $5000 • outside consultant for part or all
Data Collection	• personal interactions • observations	• observations, interviews, surveys, journals/logs, record analysis, evaluation go-rounds — from all or a sample of participants	• surveys, in-person or phone interviews, focus groups, case studies, observation journals/logs, document and record analysis — from all or a sample of participants with a formal design
Findings	• personal and/or collegial interpretations • learnings benefit those running the program • possible program changes	• personal, collegial and/or stakeholder analysis and interpretations • learnings beneficial for those running, supporting, or participating in program • possible program modification, expansion, or termination	• expert, collegial, and/or stakeholder analysis and interpretations • learnings beneficial for those running, supporting, or participating in program, as well as others in field or community • possible program modification, expansion, or termination
Communication	• conversation	• face-to-face discussions • written progress and final reports to audiences on/off-site	• face-to-face discussions • formal, written progress and final reports to audiences on/off-site • publication of findings

Preparing for Evaluation

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Preparing for Evaluation

Preparing for Evaluation

Preparing for evaluation is likely to take more time than you anticipate. The preparation for evaluation often takes more than 50% of the total time dedicated to the entire evaluation. It is very difficult to shortcut the preparation process. Experience has shown that insufficient attention, at the "front end" to the details of preparing for the evaluation usually produce confusions, delays or misunderstandings at the "back end."

Preparing for the evaluation usually includes the following: forming an evaluation committee, deciding on the level of formality for the evaluation, negotiating the aims of the evaluation through consultation with stakeholders, focusing and framing the evaluation and formulating the evaluation questions.

These activities are interdependent. Earlier decisions may have to be modified in light of considerations which emerge later. The final shape of the evaluation may emerge only after considerable discussion has taken place.

Organizing for Evaluation

a. Form an Evaluation Committee

Each evaluation and each program requires its own preparation. Each evaluation must be customized to fit the circumstances. There are no "off-the-shelf" evaluations, which can be borrowed from some other place. Forming an evaluation committee is a useful way to start.

Such a committee may be as few as two people, or it may be a larger group representing many perspectives within the synagogue, school, or agency setting. Such a committee may serve different functions depending on the situation:

- ▲ To conceptualize the evaluation by working with funders, policy makers, and program providers
- ▲ To act as an advocate for evaluation
- ▲ To find funding for the evaluation
- ▲ To encourage and support informal evaluations
- ▲ To hire the outside evaluator
- ▲ To advise the outside evaluator on preferred instruments
- ▲ To provide the outside evaluator with organizational perspectives
- ▲ To serve as liaison between the outside evaluator and insiders
- ▲ To review and contribute to findings
- ▲ To assist in formulating the reporting plan
- ▲ To assist in formulating the action plan

While the steps in preparing for an evaluation are presented in what appears to be chronological order, most evaluation committees will want to discuss the full range of issues before finalizing decisions about any of them. Figure 3 is a worksheet which can be used to record decisions as they are made.

b. Decide about Evaluation Formality

Evaluations, as we have noted, can range from the very informal to the very formal. In this *Guide*, we have suggested that, at a minimum, everyone connected with a program should engage in non-formal on-going reflection and learning from experience. Informal evaluation is usually possible and should be encouraged.

The degree of evaluation formality depends on the preferences of stakeholders, the purposes for the

Figure 3

EVALUATION WORKSHEET

1. DESCRIPTION OF PROGRAM BEING EVALUATED

   a. Goals ______

   b. Anticipated Activities ______

   c. Activities and Schedule ______

   d. Participants ______

   e. Background Staffing ______

   f. Budget ______

2. EVALUATION PURPOSE ______

3. EVALUATION FOCUS ______

4. EVALUATION QUESTIONS

   a. ______

   b. ______

   c. ______

5. EVALUATION INSTRUMENTS	6. WHO COMPLETES
a. ______	______
b. ______	______
c. ______	______

7. TIME LINE

   Evaluation Start ______ End ______ Final Report Due ______

   Data Collection Dates ______

8. REPORTING PLAN ______

9. PERSONNEL ______

10. BUDGET ______

evaluation, and the importance of the program, as well as the availability of funding, time, and personnel (see figure 2 in previous chapter). A formal evaluation should be considered except under certain circumstances. It may not be *politically* wise to do a formal evaluation. If such a program evaluation will exacerbate a charged climate within an institution, it may be more useful to find another form of decision-making rather than have a formal program evaluation become entangled in advocacy struggles.

Or, if a program is in the very early stages of conceptualization or is experimental, informal reflections on experience by those involved with the program may be a better way to encourage program creativity than formal evaluation activities. It may not be *feasible* to do a formal evaluation. If very limited funds are available to a program, and they are essential to the operations of that program, mounting a formal program evaluation without supplying additional funding could divert resources and staff time away from running the program itself.

Or, the *technical skills* for a formal evaluation may not be available at an affordable cost.

The evaluation committee should decide if the institution and the program are ready to do a formal evaluation (see figure 4).

Negotiating the Evaluation Aims

a. Clarify Purpose

The purpose for doing an evaluation should be clear and well-stated. It should be negotiated among those who want the evaluation. Reaching agreement as to the purpose of the evaluation may take more time than you think. Use the list in Figure 7 to organize the discussion.

b. Consulting Stakeholders

One way to get buy-in for a formal evaluation is to consult with stakeholders. First, do a "stakeholder scan." Compile a list of all those who "have an interest" in the evaluation (see Figure 5). Ask them, either individually or in groups: *What do you want from a formal program evaluation?* They might offer their own questions, or they might choose from the list in Figure 8.

In many program evaluation situations, all stakeholders are not equal in terms of their influence. Often, those who are commissioning or paying for the evaluation have more of a say in determining the purpose of the evaluation than others. Nonetheless, involving many stakeholders in the formulation and conceptualization of the evaluation is a good way of engaging them in subsequent program improvement and program decision-making.

Figure 4

READY TO EVALUATE?

1. Enough program structure?
2. Enough program definition of goals?
3. Enough financial resources?
4. Enough technical skill?
5. Enough staff time?
6. Enough commitment?
7. Enough leadership?
8. Enough trust?
9. Enough willingness to change?
10. Enough willingness to follow through?

Figure 5

POSSIBLE STAKEHOLDERS

Current Program Funders
Potential Foundation Funders
Potential Individual Donors
Board Members
Committee Members
Licensing or Accrediting Groups
Program Providers
Potential Program Providers
Program Participants
Friends of Program Participants
Congregants
Colleagues • Researchers
Other Institutions • Suppliers
Competitors • Partners • Media

Figure 6a

WHAT STAKEHOLDERS WANT

The stakeholders involved in a program, project, or activity may differ in what they expect from an evaluation. Each group wants information that they regard as trustworthy and conveniently packaged to facilitate their own understanding.

GROUP 1

Foundation program officers, donors, policy makers, other organizations, potential program adopters, the media, and the community at large. These individuals usually want summative evaluation information in a formal evaluation report that will concisely summarize the results or benefits obtained from doing the program. They frequently want observable impacts, cost/benefit analysis, and comparisons with other programs that might achieve the same results.

GROUP 2

Lay leaders, program managers, educators, trainers, teachers, interested professionals in the same or other agencies, and researchers. These individuals usually want formative evaluation information which they can use to form or re-form the program or to adopt and adapt it to their own circumstances. They are often interested in the details of the process of implementation, as well as program impact. They usually want information in the form of informal reports, guidelines, and lessons learned. They also may want oral presentations.

GROUP 3

Participating individuals, families, institutions, and communities. These individuals usually want feedback about how they and others involved with the program perceive the program. They are not typically interested in written reports; rather, they prefer oral presentations accompanied by handouts, which they can discuss, reflect upon, add to, and modify. They appreciate description and interpretation, not measurement and prediction, coming from observations and interviews.

TALKING WITH STAKEHOLDERS

Accomplishing the task of evaluation is not enough. Equal attention must be given to the entire evaluation process and the people involved. ... People are committed to what they help create. Members of an organization should help create their own evaluation. An evaluation process or methodology imposed from outside an organization is often resisted. A generic one-size-fits all approach is typically suspect. People ask: How will it fit our organization's unique circumstances and needs? Will it provide information that is useful to us? Will we have input into the process? What will be done with the results?

In order for evaluation results to be used by the organization for learning, improvement and change, the results must be perceived as accurate, credible and "useful" to all participants. Evaluation results are useful when they enhance the organization's common understanding of reality.

("Learning and Change: The Desired Outcomes of Evaluation," Linda Fisher, in *A Vision of Evaluation*, published by the Independent Sector.)

Evaluation is an opportunity to engage [stakeholders] in fruitful conversation... If evaluation is to prove truly useful as a form of education, it must make itself at once intelligible, credible, and provocative to its diverse audiences. For there to be meaningful contact, the conclusions of an evaluation should, first of all, be intelligible to an informed public and the means of reaching the conclusions should be explicable as well....

Evaluations should also be credible to the audience they address. They should acknowledge, in the approach chosen and the methods employed, their audiences' convictions about what kinds of information are dependable and believable....

A truly useful evaluation, however, does not only work within the established horizons of its audience; it also helps to expand those horizons, by introducing new facts and new ways of seeing the facts. It must therefore aim to be provocative as well as intelligible.... It must have the capacity to provoke constructive conversation among a variety of interested publics about the fundamental issues and problems at stake in a program policy.

In choosing sources for information, then, the evaluators' special responsibility is to look beyond the readily available options and to seek out the perspectives of those interested publics who are not usually part of the conversation. Likewise, in rendering that information to a larger audience, the evaluator should strive to organize the material in interesting and illuminating ways.

If there are, indeed, differences of perspective represented, how might these differences be understood? What fundamental values or visions unite or divide the publics represented? How might the information be provided to audiences in a way that encourages dialogue about these fundamental concerns?

(The Lily Endowment, Inc., *Evaluation Notebook*, 1989.)

Figure 7

PURPOSES FOR FORMAL PROGRAM EVALUATION

1. To improve the program (formative evaluation)
2. To assess the worth and merit of the program (summative evaluation)
3. To improve the quality of program delivery (implementation evaluation)
4. To increase the effectiveness of the program (impact evaluation)
5. To modify the program in light of changing needs (reconceptualize program)
6. To ascertain whether the program met its goals (goal-based evaluation)
7. To obtain or maintain accreditation for the program
8. To meet an imposed evaluation requirement
9. To ascertain compliance with preexisting standards
10. To publicize the program
11. To disseminate the program

Figure 8

EVALUATION ORIENTATIONS AND QUESTIONS

1. **Formative evaluation asks:** *How can we improve this program?*
2. **Summative evaluation asks:** *Is this program worth doing?*
3. **Implementation evaluation asks:** *How well does the program deliver its services?*
4. **Impact evaluation asks:** *What effect does the program have on participants and others? What changes have occured as a result of the program?*
5. **Goal-based evaluation asks:** *To what extent has the program achieved its goals?*
6. **Goal-free evaluation asks:** *What are the consequences of this program, both anticipated and unanticipated?*
7. **Decision-oriented evaluation asks:** *What should we find out so we could solve problems associated with the program?*
8. **Responsive evaluation asks:** *What is important to people about this program?*
9. **Accountability evaluation asks:** *How does this program comply with a particular set of standards?*
10. **Cost-benefit evaluation asks:** *How do the costs of this program compare with the benefits? Is the program worth the cost?*

a. Choose a Formative or Summative Orientation, or Both

The maturity of the program influences the decision about whether to do a formative or a summative evaluation (see Figures 7 and 8).

Formative evaluation is helpful when a program is relatively new, still being formed, and needs fine-tuning to "improve." Since the purpose for formative evaluation is program improvement, it is useful only if there will be a "next time" for the program. If a program or event is one-time only and will never be repeated, formative evaluation is not needed. Informal evaluation is sufficient.

Summative evaluation usually occurs when a program has been "shaken down" and is working well. Summative evaluation is concerned with "summarizing" the worth or merit of the program

— to "prove" something about the program. Summative evaluation is especially relevant if decisions must be made about whether the program is to be refunded, defunded, expanded, or contracted.

It has been said that formative evaluation is "when the cook tastes the soup." Summative evaluation is "when the guests taste the soup."

While, in actual practice, the differences between formative and summative evaluations get blurred, the distinction should be kept in mind for two reasons. The first is that program staff and program participants are unlikely to be candid about what they see as problems needing to be fixed if they are concerned that their comments may negatively affect the program's survival. The second reason is that a summative evaluation, in contrast with a formative evaluation, is likely to be more encompassing and include cost/benefit analyses, comparisons with alternative programs, analyses of competing uses for program funds, and judgements about program relevance to institutional priorities.

b. Choose an Implementation, or Impact Orientation, or Both

Implementation evaluation examines program quality and focuses on the appropriateness and efficiency of the program's delivery system, usually asking about administrative, curricular, and instructional aspects. Implementation evaluation and formative evaluation usually go hand-in-hand because program improvement comes from upgrading or reorganizing the delivery system of the program.

Impact evaluation, examines the direct effects that the program has on those who participate and on those who deliver the program, such as professionals or lay leaders. In addition, it explores the indirect effects on others in the institution or community and those persons having a relationship with the program, such as suppliers, competitors, or allies. Impact evaluation and summative evaluation usually go hand-in-hand because a program that does not affect participants may not be worth the money it costs (see Figures 7 and 8).

c. Choose a Goal - Based Orientation

Goal-based evaluation may be formative or summative, implementation or impact depending on the stated goals of the program. **Goal based evaluation asks about the extent to which program goals have been achieved.** If the goals of the program are well-stated, this is a useful approach (see Figures 7 and 8).

Some evaluators, program funders, or policy makers urge strongly that program goals be turned around into program evaluation questions. The usefulness of such goal-based evaluation questions depend on the exactness with which the program goals can be stated. In order for program goals to serve as the basis for evaluation questions, goals must:

- Be stated in terms of desired or anticipated participant outcomes rather than the intentions of the program providers
- Focus on important rather than trivial outcomes for participants
- Contain indicators by which the participant outcomes can be ascertained
- Be achievable by the participants within the time frame of the program
- Be backed up by activities which give participants the information and practice necessary to achieving the goals. Goal-based evaluation questions can be helpful in pushing program providers to become more precise about what it is they want to happen for participants and how they will know whether it has happened.

Sometimes, program providers cannot formulate important, measurable, and achievable goals because they do not yet know enough about what will happen when the program actually runs. In this case, an informal or formal evaluation, which deals with implementation or impact issues, will be more appropriate than a goal-based evaluation.

Framing the Evaluation

In preparing for an evaluation, the evaluation committee should consider duration, cost, and personnel requirements.

- **Informal evaluations should begin when the program is being conceptualized.** Program providers should be asking themselves evaluative questions about their planning process, their goals, and how the activities of the program contribute to achieving those goals. Informal evaluations occur within the same time frame as the program. Data is collected from participants as the program goes on, although sometimes follow-up data is obtained.
- **Formal evaluations should begin when program planning begins and should be integrated with the program's time frame.** Initiating the formal evaluation process concurrently with the program planning can substantially alter the program itself. Evaluators, by asking about implementation and impacts, often alert planners to gaps that are correctable before the program begins. Data collection may start before the program begins in order to get baseline information about participants, so as to compare their before and after responses.
- Formal evaluations take time to plan, carry out, and write up. Often, they take many more weeks to complete than originally anticipated because of slippage in data collection, analysis, and report writing.

  In real-life, it is more usual to design the evaluation to conform to the available funding rather than to design a desirable evaluation and then find the needed dollars. Apart from the administrative, clerical, and computer expenses associated with an evaluation, the major costs are paying for someone's time to conceptualize the evaluation, develop instruments, collect and analyze the data, and write and present the final report.
- For informal evaluations of small programs, where program professionals do their own data collection and analysis, expenses are small. These may include refreshments for the evaluation committee, copying, mailings, phone interviews, and staff time in data analysis and report writing. These informal evaluations can be done for under $1,000. However, remember that staff time is not free. There are what are called "opportunity costs." The time that program people spend on evaluation is not available to be spent on programming.
- For formal evaluations, outside consultants may be used either for the entire evaluation or for only one part, such as designing instruments, collecting data via interviews or focus groups, or doing data analysis. Expensive outside time can be kept to a minimum if administrative tasks are done in-house.
- In the general educational and non-profit communities, even small scale program evaluations usually cost upwards of $10,000.

  The government used to allocate 5% of program costs of large programs for evaluation.

  In the Jewish community, at the present time, it is common for small scale evaluations to be budgeted — when they are funded at all — at $2,500 to $10,000 a year, with $5,000 - $7,000 being a typical range. However, evaluation may require 5-8% of an overall program budget.
- Fees for evaluators, like other consultants, vary greatly depending on the expertise and reputation of the individual. Consultants may estimate their time by the hour, anywhere from $30 to $120 for large projects, or they may provide a single estimate for the entire project, building in contingency estimates if the demands on their time increase.
- Who should do it? The decision about whether to use inside or outside evaluators depends on the formality of the evaluation and how much money is available. Whether to use an outside evaluator is a judgement call, which requires balancing the tradeoffs (see Figure 9).

▲ While each situation is different, in general:

- The larger, the more consequential, or the more political the program is, the more likely that an outside evaluator is desirable in order to establish credibility.
- Formal summative evaluations nearly always require an outside evaluator, especially for a program that is well conceptualized, large scale, or multi-site and likely to be used as a model for other programs.
- An outside evaluator is desirable when a formal, formative evaluation is being done with a promising program that could benefit from expert and experienced attention to implementation and impact considerations.
- An outside evaluator can be helpful even in relation to one or two aspects of the program, even if there is insufficient funding for that person to take overall responsibility. He or she might work with the evaluation committee or program staff to frame the evaluation, develop or review data collection instruments, review the findings, and discuss how to disseminate and use them. Other people could handle the administrative and dissemination burdens.

Figure 9a

OUTSIDE or INSIDE EVALUATOR?

OUTSIDER AS EVALUATOR

ADVANTAGES

- Technical skills
- Experience with other programs and evaluations
- Ability to get things done
- Credibility
- Lack of investment in the outcomes so stakeholders assume credibility
- Lower costs
- Familiarity with the context
- Capacity-building for professionals in terms of learning about evaluation
- Implied commitment to follow-through on findings

DISADVANTAGES

- Higher costs
- Insufficient knowledge of context
- Possible mis-match of evaluator to program
- Difficulty of finding the right person
- Lack of sufficient commitment
- Possible role conflicts
- Perceptions of partiality

INSIDER AS EVALUATOR

ADVANTAGES

- Lower costs
- Familiarity with the context
- Capacity-building for professionals in terms of learning about evaluation
- Implied commitment to follow-through on findings

DISADVANTAGES

- Lack of skill or time to devote to evaluation
- Possible role conflicts
- Perceptions of partiality

Figure 9b

SAMPLE COSTS FOR OUTSIDE EVALUATOR

PROGRAM:

This year-long program is intended to increase the Judaic knowledge of an organization's staff so that they, in turn, will increase the Judaic content of their programming with Jewish teenagers. The program has three components: a one-weekend training institute; three sessions of small support/discussion groups; and individual mentors for each staff member.

EVALUATION:

After negotiating the purpose questions, the evaluation design, and the data collection strategy, the outside evaluator is to be on-site to observe the training institute, converse with participants, develop and analyze end-of session questionnaires, do phone interviews after the second session with three randomly-selected participants in each of the small discussion groups, and with the six mentors. The outside evaluator will produce a final report. Evaluation per hour.

ESTIMATED BUDGET:

Negotiation of evaluation questions with stakeholders (1 day)	$ 800
On-site observation (2 days)	$ 1,600
Preparation and analysis of survey (3 days)	$ 2,400
Fifteen 30 minute phone interviews, plus set-up time (2 days)	$ 1,600
Final report, draft and revisions (2 days)	$ 1,600
Follow up analysis of programming to ascertain Judaic content (2 days)	$ 1,600
TOTAL	$ 9,600

Formulating Evaluative Questions

Once the evaluation purposes and orientations are clear, the next step is stating the questions. The evaluation questions shape the subsequent development of data collection instruments. Questions can either be generated by the committee or selected from Figures 11-17 below.

Focusing the Evaluation

After obtaining agreement on the general purposes for a program evaluation, the evaluation committee should decide about the orientation or the evaluation.

Figure 10

EXAMPLES: FORMULATING GOAL-BASED QUESTIONS

Program Goal	1. This program will introduce people to the joys of Shabbat.
Possible Evaluation Questions	Did this program introduce people to the joys of Shabbat? Were people introduced to this topic or did they already have some familiarity with it? Did they find Shabbat joyful at the end of the session? What was the evidence that they did so?
Comments	The evaluation questions that can be derived directly from this program goal seem somewhat silly and not worthy of a lot of attention. This is because the goal is stated in terms of the vague intentions of the program providers, not in terms of outcomes for participants. What is supposed to happen for participants?

Program Goal	2. This program will provide a meaningful Shabbat experience for the 20 families of second graders. It will teach them about rituals and prayers and will encourage them to have Shabbat dinners. **A literal view of these goals would produce evaluation questions such as:**
Possible Evaluation Questions	Did this program provide a meaningful experience? How many families of second graders came? Did the appropriate teaching occur? Were families encouraged to have Shabbat dinners? **A more inferential approach would yield the following questions of participants:** In what ways was the program meaningful to you? What rituals and prayers did you learn? Do you plan to have a Shabbat dinner any time during the next month? One might ask families to demonstrate their knowledge. One might also engage participants in follow-up conversations to find out if people actually had Shabbat dinners as a result of the program.
Comments	As with the question above, the program goals are written in such a way that evaluation questions derived from them would focus exclusively on program execution and whether the program did what it promised. (Indicating the number of expected families does permit comparisons of actual vs anticipated attendees.) By inferring what the intended outcomes are, however, additional evaluation questions could be asked and answered.

Program Goal	3. Through this introductory Shabbat program for the families of 20 second graders, participants will become more aware of the value of Shabbat, will increase their knowledge of Shabbat practices, and will host or be guests at one Shabbat dinner in the next month.
Possible Evaluation Questions	These goals are stated in terms of anticipated participant outcomes and are readily evaluated. Since the goals call for change in attitudes, knowledge, and behaviors, the evaluation should assess the pre-program attitudes, knowledge, and behaviors of the participants. While attitudes and knowledge can probably be assessed immediately following the program, the hoped-for behaviors will need follow-up to find out if they actually happened.
Comments	An evaluation of these goals would report the actual attendance vs. the expected attendance. An informal evaluation could assess the pre-program status of participants by asking people to introduce themselves and describe what they now feel/do about Shabbat. This could be done using a short, written survey/essay or an evaluation go-around at the end of the session. A formal evaluation would likely require a pre/post rating form which participants would complete along with some demonstration of their actual knowledge.

Figure 11

QUESTIONS ABOUT PROGRAM PLANNING

- Were all those who should have been involved included in the planning?
- Did the planning cover everything needed to carry out the program (e.g., publicity, marketing, materials, room arrangements, food, clean-up)?
- Were the program goals clearly specified?
- Was the program relevant to participants' needs/wants/interests?
- Did the program address an important and needed area?
- How is the program similar or different from competing programs?
- Is the program compatible with the aims of the institution? Community?
- Does the program advance the interests of the institution? Community?
- What would have happened if there had not been a program?

Figure 12

QUESTIONS ABOUT PROGRAM IMPLEMENTATION

- How many people participated?
- How many people came compared with how many were expected?
- Did the program reach the people it wanted to reach?
- How was retention over the duration of the program?
- Did, or would, participants come back a second time?
- Would participants recommend the program to others?
- Was the program properly administered?
- Was the staff properly recruited and trained?
- Was the marketing of high quality? Appealing and appropriate to the audience? Properly targeted? Timely?
- Were the facilities/arrangements/logistics satisfactory?
- Was the program the appropriate length?
- Was the content appropriate to the participants?
- Were the activities consistent with program objectives?
- Were the activities sufficient to achieve program objectives?
- Did the activities hold participants' interest?
- Was there sufficient variety in the activities?
- Was the pacing of the program adequate?
- Were the materials appropriate and of good quality?
- Were there take-home materials?
- Was there monitoring of quality during the program?
- Were there opportunities for participant feedback during the program?
- Was there a way for handling problems as they arose?
- How much did the program cost in dollars and time? Total? Per participant?
- Could the program have been done for less? What would have been sacrificed?
- Was follow-up planned? Was follow-up implemented?
- What problems were encountered?
- What successes were achieved?
- What should be done differently next time?

Figure 13

QUESTIONS ABOUT OVERALL IMPACT ON PARTICIPANTS

- How did the program affect participants immediately after? Several months after? What specific examples did they give?
- What changes did participants report in their own knowledge, skills, attitudes, and behaviors as a result of the program?
- What observable changes occurred in the behaviors of participants?
- What aspects of the program were participants most satisfied with? Most dissatisfied with?
- What direct payoffs/benefits did the program have on participants?
- What intangible payoffs/benefits did the program have on participants?

Figure 14

QUESTIONS ABOUT IMPACT ON PARTICIPANT ATTITUDES

- ▲ In what ways did participants change their attitudes or opinions?
- ▲ What will participants remember six months from now?

The questions below are adapted from a taxonomy which helps teachers set educational goals and helps evaluators explore changes in students' affective functioning.

AWARENESS: Did participants increase their awareness of or their willingness to pay attention to a particular area?

SATISFACTION: Did participants increase their satisfaction or their willingness to respond to a particular area?

VALUING: Did participants come to value, come to be interested in seeking out, or become committed to a particular area?

PRIORITIZING: Did participants come to assign different priorities to particular values? Did participants reorganize their value systems in particular areas?

INTEGRATING: Did participants integrate values in a particular area into their belief systems and into their world view?

(Adapted from
Taxonomy of Educational Objectives: Affective Domain.
David R. Krathwohl, Benjamin S. Bloom, and Bertram B. Masia, 1967)

Figure 15

QUESTIONS ABOUT IMPACT ON PARTICIPANT KNOWLEDGE

- ▲ What did participants learn that was new to them? What was exciting?
- ▲ What will participants remember six months from now?

The questions below are adapted from a taxonomy which helps teachers set educational goals and helps evaluators explore changes in students' cognitive functioning.

DID PARTICIPANTS ACQUIRE NEW KNOWLEDGE? Knowledge involves the recall of specific facts, terminology principles, patterns, or themes.

DID PARTICIPANTS INCREASE THEIR COMPREHENSION OF SOME AREA?

Comprehension involves understanding material so that an individual can accurately paraphrase or translate it into their own words, can re-order or summarize the material, or can extrapolate from the material and indicate inferences that can be drawn from it.

DID PARTICIPANTS INCREASE THEIR ABILITY TO APPLY THEIR KNOWLEDGE? Application involves making use of abstractions such as ideas, procedures, or methods in particular and concrete situations.

DID PARTICIPANTS INCREASE THEIR ABILITY TO ANALYZE? Analysis involves being able to break down an idea into its component elements, understand the arrangement of the elements to one another, understand how something is ordered and structured, and how it transmits its message.

DID PARTICIPANTS INCREASE THEIR ABILITY TO SYNTHESIZE? Synthesis involves putting together parts to form a whole, and arranging or recombining separate ideas to produce a unique communication, a plan, or a proposed set of operations.

DID PARTICIPANTS INCREASE THEIR ABILITY TO EVALUATE? Evaluation involves judgments about the value of materials and methods, both in terms of internal evidence and in terms of external criteria.

(Adapted from
Taxonomy of Educational Objectives: Cognitive Domain.
Benjamin S. Bloom, 1965)

Figure 16

QUESTIONS ABOUT IMPACT ON PARTICIPANT BEHAVIORS

Did participants demonstrate new levels of skill? Which?

Did participants change their at-home behaviors? Which increased? Which decreased?

Did participants change their social behaviors? Which increased? Which decreased?

Did participants change their affiliative behaviors? Which increased? Which decreased?

Figure 17

QUESTIONS ABOUT IMPACT ON NON-PARTICIPANTS

What positive or negative effects did the program have on the sponsoring institution?
- — On other institutions?
- — On partners? On competitors?
- — On the community-at-large?

What positive or negative effects did the program have on the program providers?
- — On the program planners?
- — On others associated with the institution?

Collecting Data

~4

Collecting Data

Considerations

After choosing the evaluation questions, it is time to decide how to collect data to answer them.

What is data?

Data are facts and figures from which answers or conclusions can be inferred. People's responses on a questionnaire or an interview are data. Tally marks or notes on an observer's report are data. Census figures are data. Attendance lists, phone logs, journal entries, records of books checked out of the library are all data. People talking about their home observances, describing their feelings, about being Jewish, telling anecdotes are data. Photographs, movies, audio tapes capture and preserve visual and oral data.

What are data collection instruments?

Data to answer program evaluation questions are collected by using instruments such as those mentioned below — questionnaires, interviews, observation schedules. record keeping, photography and the like. (See Figure 18)

Data collection instruments for program evaluation can either be developed by the program evaluator, or they can be adopted or adapted from those used by other program evaluations. Selecting the most appropriate instrument or combination of instruments is the function of the evaluation committee, the outside evaluator or the inside person doing the evaluation.

Who supplies the data?

Data can be collected from many different kinds of people, depending on the evaluation questions being asked.

Objectivity and subjectivity in collecting data

Until recently, objectivity was thought to be characteristic of program evaluations in the same way that it was thought to be characteristic of scientific experiments. Today, philosophers, scientists, and other experts explain that in the hard sciences, as well as in the social sciences, objectivity is always influenced by the interaction between the observer and the observed.

Scientists now know that the presence of an observer affects the behavior of whatever is being observed and that the observer subtly modifies that which is observed in ways which he or she doesn't even recognize. Survey responses are always influenced by the phrasing and order of the survey questions. Interviews are always influenced by interview questions and the interviewer himself. In program evaluations, we no longer make the claim that "an objective evaluator" can find out "the truth" about a program. Rather, we can expect that an evaluator will give us a perspective that is fair, dispassionate, and not deliberately biased in favor of any predetermined outcome. We can expect that an evaluator will illuminate the "multiple truths" and differing viewpoints that exist with reference to a program.

The quantitative/qualitative distinction

Quantitative data is information reported in numbers, such as attendance, test scores, people answering "yes" to a question, phone calls made, sales completed, and profits earned. Checked-off answers to a standardized question on a survey can be reported in numbers. Activity logs generate numbers. Numbers permit comparisons of groups with one another on some indicator. Methodologies for assembling and analyzing quantitative

Figure 18 **DATA COLLECTION INSTRUMENTS**

SURVEYS

(of behavior & attitudes)

- Rankings
- Ratings
- Agree/Disagree
- Check Answers
- Open Ended

TESTS

(of knowledge & skill)

- Multiple Choice
- Short Answer
- Essay
- Performances
- Demonstrations
- Role Plays
- Simulations

RECORDS, DOCUMENTS, AND PORTFOLIOS

- Artifacts
- Products
- Review of Materials
- Memos and Minutes
- Attendance Sheets
- Activity Logs

SELF-REPORTS

(of behavior & feelings)

- Logs
- Journals/Diaries
- Critical Incidents
- Anecdotes

INTERVIEWS

- Key Informants
- Participants
- Stakeholders
- Experts
- Exit Interviews
- Hearings

OBSERVATIONS

- Structured
- Semi-Structured
- Unstructured
- Still Photos
- Movies
- Videos

CASE STUDIES

(of individuals & groups over time)

GROUP INTERVIEWS

- Focus Groups
- Unstructured Discussion
- Triggered Discussion

LONGITUDINAL STUDIES

- Time Series
- Follow-Ups

Figure 19

CRITERIA FOR INSTRUMENT SELECTION

1. Fidelity to the purpose of the evaluation
2. Suitability to the program being evaluated
3. Utility in providing needed information
4. Credibility to evaluation audiences
5. Compatibility with the setting in which they are being used
6. Cost effectiveness in relation to time, resources, and staff capabilities
7. Few negative side effects

(Adapted from Nick Smith,
Northwest Regional Lab, unpublished.)

data come from many fields, such as business, science, sociology, and statistics.

Qualitative data is information reported in words, such as stories, anecdotes, comments, cases, and descriptions. People's suggestions in responding to an open-ended survey question can be reported in words. Qualitative data is less useful for comparing groups with one another, but more useful in understanding the individual, the particular or the patterns and themes running through many responses. Methodologies for assembling and analyzing qualitative data come from fields, such as anthropology, literature, history, and journalism.

Quantitative data provides information about the incidence of some characteristic in a population, while qualitative data provides information about the reasons for that incidence. Each method yields its own insights.

Many evaluations collect both quantitative and qualitative data. For example, interviews with a small number of people are often done before making up a survey, so as to get the proper short answer choices. Or, after a survey has been analyzed, in-depth interviews can be used to probe the meaning behind the numbers.

In evaluation reports, numbers are often displayed in charts accompanied by quotations, stories, or anecdotes. Or, the reverse: themes and patterns are described and supported by statistics.

Instrument Selection

Selecting appropriate types of instruments depends on the evaluation purpose, as well as on stakeholder and audience preferences. Many people in business or professions like law, accounting, or medicine prefer "hard" data — that is, numbers documenting attendance, contributions, memberships, and changes in pre- to post- program behaviors. If stakeholders and audiences like to deal with numbers because their business or technical backgrounds make them comfortable with this form of data, then quantitative data should be collected.

Others, such as educators or those in the helping professions, often prefer stories, examples, or illustrations of how programs changed attitudes or behaviors. If stakeholders and audiences are more comfortable with individual cases and interpretive explanations, then qualitative data should be collected.

People's views about what kind of information they trust are usually deep-rooted and have to do with their assumptions, often unarticulated, about the nature of truth and of reality and how we know what we know. It is unlikely that these views will change. Evaluations should accommodate them and try to provide data that satisfies both world views.

Important as stakeholder and audience data preferences are in determining what instruments to use in an evaluation, more important is finding that combination of data collection methods that will tell people what they want to know.

To understand the range of reactions to a program or the impacts that a program has had on participants, especially in unfamiliar areas, an evaluation might want to ask open-ended questions, in-person, on the phone, or in a focus group, carefully probe their explanations and views. If you want to be able to say what percentage of people think, feel, or behave in a certain way, the evaluation may want to use surveys, tests, or structured observations to provide numerical counts.

Another factor in deciding what type of instruments to use is the expertise available. Quantitative and qualitative data collection methods require different technical skills in data gathering, analysis, and presentation. Most outside evaluators have a preferred way of working, even though many can do both.

Instrument Development

We know that the way questions are asked influences the answers we get. Some examples: We know that we get different answers if we ask for ratings of each of a number of items rather than a ranking for the entire set of items. We know that even seemingly minor decisions, such as how much space is left after each question or how wide the margins are, influence the kinds of answers people provide. We know that the order, the tone of voice, or the speed with which an interviewer asks questions greatly influences what respondents talk about and how much they talk.

Figures 22 to 28 in this section provide guidance in developing interviews and questionnaires and in running focus groups. However additional books or experts should be consulted about the more technical aspects of designing instruments and interpreting results.

In formal evaluations, it is essential that instruments be developed and reviewed by technically proficient individuals.

In informal evaluations, instrument development is usually done in-house, possibly with some help from those who have knowledge and experience in designing questionnaires, interview schedules, or focus group questions.

In informal evaluations, while keeping all these variables in mind, then, we are looking for instruments that are "as good as we can get" rather than "the best possible." When you develop an instrument, "pilot" it by asking two or three people similar to the respondents to "try it out" and tell you their reactions. You, as the instrument developer, should notice whether the respondent has difficulty with the questions, would like to tell you something other than what the questions ask, or gets frustrated with the length of the survey or the interview. After you go through several revision cycles, the instrument is likely to be substantially improved.

It is often easier to modify someone else's questionnaire, interview, or focus group questions than it is to generate your own. If you collect forms that you receive in the mail, or are asked to fill out when you vacate a hotel room, or are distributed after a workshop you attend, you will develop a file with many usable ideas.

Sample Selection

In informal evaluations of small programs, all participants usually complete questionnaires or participate in interviews.

For formal evaluations, a knowledgeable consultant should assist with sampling.

In formal evaluations of large or multi-site programs, it may be necessary to select a small sample from the larger population. A sample should be selected so that the responses of the sample population will represent those of the larger group.

The evaluation may use a *random* sample which will permit generalization from the smaller group to the larger population. The proverbial "names drawn from a hat," selecting every xth person from a list until you get the number of people you want, or using a table of random numbers to select people from a list will all do. One should select as large a sample as possible, but no fewer than 20% of the population — a number acceptable to most, but not all, statisticians.

Selecting a *representative* sample is another way to go. Divide your population on some relevant variable such as sex, age, or education, and estimate their proportion in the population. Then, randomly select from all the women, for example, the number that would give you the same proportion in your sample as in the total population. If women make up 60% of your population of 200 people, they should make up 60% of your sample of 40 people.

Another kind of sample — neither random nor representative — is called a *nomination or snowball* sample. It is sometimes used for identifying respondents for individual, group, or phone interviews. It means asking one individual to suggest other people for you to contact. This process is repeated until the same names or redundant information appears.

Data Collection Schedule

When and how often to collect data depends on what you want to find out. The evaluation committee could decide to collect data from respondents before and after a program to detect changes influenced by the program. Or, one could collect data at several times during the program to detect growth or development over some time period. Or, one could collect data at the conclusion of the program or a long time after the end of the program to find out what program impact they report.

When and how often to collect data depends on what you want to find out. The previously framed evaluation questions should guide decisions, along with budget, available time, and the skills you have or can access.

In an informal evaluation, you are likely to collect data at the end of a session with an evaluation go-round or a short survey, and, if the program is multi-sessioned, at the end of the entire program.

In a formal evaluation, you may want to collect baseline data before the program starts, at intervals during the program, at the end of the program, and at some point following the program to get evidence of longer term impact. Figure 21 illustrates some of the options that can be used in either informal or formal evaluations.

Figure 20

EXAMPLE: DATA COLLECTING AS PROGRAM EVOLVES

PROGRAM CONCEPT:

A social service agency and a synagogue wanted to create an outreach program to serve intermarried couples. The goal of the program was for participants to become familiar with the Jewish tradition and clarify for themselves the ways in which they would handle ritual and holiday issues in their homes.

START-UP:

A social worker and a rabbi, partnering at his synagogue, announced in the temple bulletin a three-session program on successive Wednesday nights at a meeting room in the synagogue. Five couples showed up the first session, three the second, and two on the last evening.

NON-FORMAL EVALUATION:

Each evening, before the session started and over coffee afterwards, the social worker and the rabbi conversed with people about what had prompted them to come, what they thought of the announcement, what they thought about the content of the sessions, and why they thought there was a drop-off in attendance.

PILOT PROGRAM:

Based on this experience and the feedback they received, the programmers moved the program to a centrally located home, rescheduled it for six sessions once a month, rewrote the announcement and, in addition, asked the original couples to personally invite intermarried couples that they knew. Nine couples showed up the first night. By the end of the six months, all were still in the program with a few having missed one or two sessions.

INFORMAL EVALUATION:

At the end of each session, the programmers spent fifteen minutes doing an evaluation go-round in which participants gave their responses to different aspects of the course. Since some of each session's time was spent in small group conversation and reporting out, the rabbi and social worker learned a lot about each family's situation, and they planned their next session based on the previous session's input. Much of the last session was dedicated to a writing assignment where each participant wrote a short "autobiography of a learner" in which each traced some aspect of their personal experience over the course of the six months. The couples shared this first with each other and then with the group.

ESTABLISHED PROGRAM:

Feeling successful, the rabbi and social worker applied for a grant to do the program the following year in two houses for nine couples each using the same general format for the sessions. The funding agency required that they submit an evaluation plan with their grant application and provide a final report at the conclusion of the program.

FORMAL EVALUATION:

The social worker and rabbi used the same evaluation instruments as previously, though revised to contain better wording, and made a written record of what was said in each evening's evaluation go-round. They analyzed the end-of-program "autobiographies" in terms of how well the goals of the program had been achieved. In addition, they asked an experienced evaluator to help them draft a user-friendly questionnaire inquiring about the couple's Jewish knowledge and their thinking about ritual and holidays for use before the program began, after it was over, and six months later. They submitted a final report to the funding agency. The program has been refunded and expanded to three houses with additional facilitators being trained. Other synagogues have expressed interest.

Figure 21

DATA COLLECTION SCHEDULE OPTIONS

PRE-PROGRAM:

Application essays, journal-writing assignments, phone or in-person interviews, questionnaires, and focus groups can be used to get information from individuals or groups about their knowledge, skills, attitudes, or behaviors before a program starts.

DURING PROGRAM:

Questionnaires, evaluation go-rounds, small group reactions, tests, essays, demonstrations, and interviews can be used to ascertain participant progress, satisfactions, and reactions and solicit their suggestions. Assignments for journal writing or record keeping can be made. In-depth interviews for case study participants can be conducted by someone knowledgeable in this form of field work.

POST-PROGRAM:

The pre- or during program instruments, as above, may be used again, or different post-program measures may be developed.

FOLLOW-UP:

Previously developed instruments may be used, or new follow-up questionnaires, interviews, and focus groups may be developed.

COMPARATIVE:

Sometimes, in formal evaluations, a comparison group completes the pre- and post-program questionnaires or participates in interviews similar to those given to the program participants. This way it is possible to compare the knowledge, skills, attitudes, or behaviors of the two groups so that inferences about the impact of the program can be made.

Figure 22

HOW TO DEVELOP A QUESTIONNAIRE

Initial Development

1. Decide on the purpose of the questionnaire. (What do you want to find out from respondents?)
2. Develop a list of open-ended questions related to your purpose.
3. Ask individuals familiar with the questions to respond to the open-ended questions.
4. Use their answers to convert as many of your open-ended questions as possible into checklist, ranking, or rating format.
5. Refine the wording of the questions.

First Revision

1. Add introductory sentences which explain purpose and use of questionnaire. Promise confidentiality of answers. Thank people for their time.
2. Sequence the items in a easy to follow order.
3. Group similarly-formatted items together.
4. Vary formats. Use some short answer, some multiple choice, some ratings, and some open-ended questions. Always include a space for "other." Always ask for comments at the end.
5. Keep questionnaires short — under 15 minutes to complete, if possible.
6. Leave sufficient space for answers.
7. Leave wide margins.
8. Use readable print size.
9. Eliminate double questions.
10. Number the questions.
11. Arrange the answer boxes so they can be easily counted.
12. Indicate that his or her name is optional, unless you need it for some reason.
13. Ask for identifying information so that you can analyze answers by relevant sub-group (e.g., men/women, age, income level, educational level, experience with..., etc.)

Try-out

1. Give the questionnaire to a few people who are like your respondents. Sit with them as they answer questions. Discover ambiguous or unclear questions and formatting problems.
2. Tabulate answers to determine if items are easy to code.

Distribution

1. Mailed questionnaires usually have under a 20% return rate.
2. If questionnaires are anonymous, follow-up reminders should go to everyone. Offer to replace lost questionnaires.
3. Distribute and retrieve questionnaires at meetings so that you have a captive audience.

Tabulation

1. Hand tabulate, if questions are few or respondents are few.
2. Use spreadsheet such as Excel for data entry, tabulation, and graphic presentations.
3. Get percentages by subgroups.
4. Cross-tabulate items of interest (e.g., Did men and women differ in their level of satisfaction with the program?).

Figure 23a

EXAMPLE 1: END-OF-SESSION QUESTIONNAIRE*

We are interested in your opinion on this morning's session. Please take a few minutes to give us your responses. They will help us in planning for the next such session. Thank you very much.

Please let us know a little about yourself.

Sex: M____ F____

Age: Under 30____ 31-45____ 46-64____ Over 65____

Please indicate your answers using this scale, and add explanations and comments. Use additional sheets, if needed.

1. Poor
2. Fair
3. Good
4. Excellent

Comments

1. ___ Overall, I would rate this session
2. ___ The content of this session
3. ___ The activities in this session
4. ___ The sequence of activities
5. ___ The room arrangements
6. ___ The refreshments
7. ___ The length of the session
8. ___ The instructor's expertise
9. ___ The instructor's teaching skill
10. ___ The handouts
11. ___ My interest in the topic
12. ___ My level of participation
13. ___ My understanding of session goals
14. ___ My achievement of session goals
15. How did you hear about this session?

16. Did the session meet your expectations?

17. Would you recommend this session to a friend?

* Adapted from course evaluation form, Center for Non-Profit Management, Los Angeles, CA.

Figure 23b

EXAMPLE 2: END-OF-SESSION QUESTIONNAIRE

Please take a few minutes to tell us whether we accomplished our goals with your family. After talking with your child, circle and explain your child's views and your own responses to these questions We read every single answer and take your comments and suggestions very seriously.

1. We wanted you to spend an enjoyable morning building and decorating the Sukkah.

a. How did your child feel about this morning's activities?

Liked it____________________Just OK____________________Disliked it

1 2 3 4 5 6 7 8

Why ?

b. How did you feel about this morning's activities?

Liked it____________________Just OK____________________Disliked it

1 2 3 4 5 6 7 8

Why?

2. We wanted you to want to create a Sukkah of your own at home next week.

a. To what extent does your child want to do this?

A great deal____________________Uncertain____________________Not at all

1 2 3 4 5 6 7 8

Why or why not?

b. To what extent do you want to do this?

A great deal____________________Uncertain____________________Not at all

1 2 3 4 5 6 7 8

Why or why not?

3. We wanted you to know how to build a Sukkah and where to get all the materials.

a. Did you learn what you need to know? Please describe what you learned.

b. Do you have other questions? Please list them.

4. *a. What worked well for your child about this morning's program?*

b. What worked well for you about this morning's program?

5. *a. What changes would your child suggest?*

b. What changes would you suggest?

6. Please tell us anything that you or your child want us to know.

Thanks again for your views and your time.

Figure 24

EXAMPLE: PRE/POST QUESTIONNAIRE

Thank you very much for taking the time to complete this short form. We are interested in learning something about your background and your current activities. Sometime in the future we may want to ask you additional questions. In order that we may be able to connect your responses, do not sign your name but please put the last four digits of your phone number on the form.

1. Date_______________ 2. Last four digits of your phone number _________

3. Sex: M___ F___ 4. Age: Under 30___ 31-45____ 46-64____ Over 65____

5. Educational background *(Please check all that apply)*

____ College degree	____ Jewish religious school
____ Advanced degree	____ Bar/Bat Mitzvah
____ Adult education	____ Confirmation
____ Professional/Continuing education	____ Jewish camp
____ Other (Describe)	____ Other (Describe)

6. Your family's religious practices as you were growing up / Your family's religious practices now

(Please check all that apply)

Your family's religious practices as you were growing up		Your family's religious practices now
____	Light Shabbat candles	____
____	Participate in Passover Seder	____
____	Participate in High Holiday celebrations	____
____	Attend religious services regularly	____
____	Follow events in Israel	____
____	Other (Describe)	____

7. Please use the following code to indicate your current level of participation in each of the following:

1 - Daily 2 - Weekly 3 - Monthly 4 - Several times a year 0 - Never

a. ____ Think about something related to Jewishness

b. ____ Discuss with others something related to Jewishness

c. ____ Interact with Jewish peers

d. ____ Participate in a Jewish-organized social activity

e. ____ Participate in a Jewish-organized service activity

f. ____ Participate in a Jewish-organized religious activity

g. ____ Participate in a Jewish-organized study activity

h. ____ Participate in a Jewish-organized cultural activity

Figure 25

HOW TO DO INTERVIEWS

1. PREPARING FOR THE INITIAL CONTACT

- ☐ a. Decide why you want to speak to this individual
- ☐ b. Decide what topics you want to discuss with the individual
- ☐ c. Decide how you will introduce yourself and your purpose
- ☐ d. Decide how much time you will need with the individual
- ☐ e. Decide how you will persuade person to assist you (Find the WIFM - What's In it For Me?)
- ☐ f. Rehearse the initial contact either mentally or through role-playing with a friend

2. PREPARING FOR THE INTERVIEW

- ☐ a. Decide whether you want a structured or semi-structured interview
- ☐ b. Prepare your introductory statement, which includes thanks for the time, purpose of project, length of interview, use of the information, confidentiality, note taking, and recording
- ☐ c. Prepare your opening remarks, which include topics to be covered, how you will ask questions, what you will do about time, and focus of interview.
- ☐ d. Prepare your questions, which are either carefully worded or open-ended questions with probes (Indicate the "must-ask" questions)
- ☐ e. Sequence the questions for easy transition, but be prepared to change the order as needed
- ☐ f. Decide how to take notes and/or tape (If needed, get notebook)
- ☐ g. Prepare your closing remarks, which include thank yous and next steps (if any)
- ☐ h. Rehearse the interview either mentally or through role-playing with a friend

HOW TO DO INTERVIEWS CONTINUED ON NEXT PAGE

Figure 25

HOW TO DO INTERVIEWS con't

3. CONDUCTING THE INTERVIEW

a. Establish rapport and express appreciation
b. Make introductory and opening remarks (See above)
c. Keep interview focused and keep track of time
d. Always ask: Anything else you think I should know? Anyone else you think I should speak with?
e. Make closing remarks

4. AFTER THE INTERVIEW

a. Supplement your notes
b. Write thank you note and follow up as needed
c. Review what you've learned, what you need more information about, and differences/similarities among respondents
d. Review your performance: What went well/needs improvement?

EXAMPLES OF QUESTION LEAD-INS

a. Please tell me something about your own relationship to...
b. What has been your experience with...?
c. What is your reaction to... ?
d. How satisfied are you with...?
e. I understand that... Is this your view?
f. Suppose that... What would you do?
g. What do you think would happen if...?
h. What are your ideas about...?

EXAMPLES OF QUESTION PROBES AND FOLLOW-UPS

a. Can you tell me more about that?
b. Can you give me an example?
c. If I were there, what would I see?
d. So, you are saying that...
e. Do you mean to imply... ?
f. Am I summarizing correctly when I say... ?
g. I don't understand exactly what you mean by...
h. Is there anything else that you want to tell me?

Figure 26

HOW TO DO FOCUS GROUPS

USES OF FOCUS GROUPS:

- To understand feelings, attitudes, and opinions of a group before, during, or after a program
- To explore the impact of a program

PLANNING:

- Personal invitations, explanations, thank-yous, and follow-up
- Size: 6-10 people
- Composition: homogeneous on some relevant characteristic
- Length of session: one and a half to two hours
- Place of session: living room or round table in meeting room
- Preparation of 4-5 open ended questions with probes
- Recording or note-taking

CONDUCTING (As facilitator or recorder):

- Set-up: welcome, thank you, explanation of focus groups in general, purpose of this group, importance of speaking from experience, use of data, confidentiality, recording permission, and length of session
- Go-round introductions: facilitator models time, content, and level of detail
- Facilitator poses questions and encourages cross discussion, participation, easy transition between questions, and keeps track of time
- Facilitator asks for oral or written summaries
- Recorder takes notes with as many quotes as possible
- Recorder indicates where tape should be referred to
- Recorder adds own observations as marginal comments

ANALYZING, CONCLUDING, AND REPORTING:

- Facilitator/recorder discuss and record impressions
- Listen to tapes and re-read notes
- Code by questions/theme, get counts, and extract quotes
- Prepare tables, graphs, and narrative
- Discuss and finalize interpretation and implications

Figure 27

EXAMPLES: FOCUS GROUPS

#1

FOCUS GROUP PURPOSE:

To get information from Jewish teens about their interest in and use of computer programs that are intended to put them in touch with a rabbi, one another, and on-line Jewish resources.

PROCEDURES AND QUESTIONS:

A group or ten teens were assembled. A youth worker facilitated the hour and a half discussion. After a go-round of self introductions, the facilitator explained that the purpose was to get their views about connecting with one another via computer. He informally guided the discussion through the following questions, promoting cross-conversation among the teens while a notetaker recorded answers and taped the discussion.

- **Tell us something, in general, about how you use the computer - at home or at school - and how often.**
- **Give us a little information about your Jewish background, current interests, and friends.**
- **What has been your experience with this Jewish-on-line program? What have you used/not used? Why?**
- **What would make it more interesting/better for you?**
- **What else do you want to say?**

The facilitator thanked everyone for their participation and indicated some likely next steps.

#2

FOCUS GROUP PURPOSE:

To get ideas about new or improved synagogue programs or activities that congregants would welcome.

PROCEDURES AND QUESTIONS:

An evening of "Table Talks" was scheduled, invitations sent, and Bulletin announcements made. Congregants were invited to sit with self-chosen "affinity groups," such as pre-school parents, B/B parents, newcomers, regulars, and empty-nesters. An opening welcome and explanations were given by the Rabbi and Board President. Facilitators who were recruited from the congregation and previously trained at an orientation meeting, guided their groups through a discussion framed by the following five questions while notetakers recorded and tape-recorded answers. After a go-round of self-introductions, facilitators asked and promoted cross-conversation about:

- **What is a typical week of activities like in your life?**
- **What activities/programs at the synagogue have you been involved with? Why did these interest you?**
- **During the next year, what could the synagogue offer that you would find worthwhile?**
- **What would you like your own involvement to be in getting these up and running?**
- **Any other suggestions/ideas/comments you might have?**

The facilitator thanked everyone for their participation and indicated some likely next steps.

Figure 28

EVALUATIVE GO-ROUNDS

The following sentence completions can be used at the end of sessions, events, and programs either in oral go-arounds or in writing. Everyone can complete the same sentences orally or in writing, or small groups can discuss and report out. Families can discuss and report out either individually or jointly. These sentence stems also can be turned into checklists or ratings for use in questionnaires.

SATISFACTIONS

1. One thing I really liked about today was...
2. Something that would have made this better for me is...
3. Something I really appreciated about today was when...
4. Something I really was dissatisfied with was...

FEELINGS

1. Something that surprised me about today was...
2. I found myself getting angry/hurt/bored at...
3. In relation to what I expected from this, it was...
4. In terms of what I really wanted from this, it was...
5. I really felt comfortable about...
6. Something that made me anxious was...

LEARNINGS

1. Two things I learned (about myself, the topic, my family, or this group) were...
2. Something that I will take home with me is...
3. One thing I got a new insight or perspective on was...
4. One thing I found out about other families was...
5. Something that I want to learn more about as a result of this is...
6. A skill that I became better at is...
7. This really changed my way of thinking about...
8. Something I'm still puzzled about is...
9. Something I learned about for the first time was...
10. Something I learned more about, which I already knew, was...

VALUING

1. Something I became aware of was...
2. I really came to appreciate the importance of...
3. Something I want to commit to is...
4. Something that I will make a top priority is...

INTENDED CHANGES

1. Two things I plan to do because of this are...
2. One thing I want to change about... is...
3. Something that I will continue to think about as a result of this is...
4. Something I intend to learn more about as the result of this is...
5. I will follow-up on what I gained here by...

Findings and Their Uses

~ 5

Findings and Their Uses

The first two phases of doing an evaluation, as we have already indicated, are preparing for the evaluation and collecting data to answer questions of interest. However, much of the good work which has gone into these "front-end" phases will be lost unless care is taken by all those involved — especially the evaluation committee and the evaluation consultant if there is one — to properly attend to the two "back-end" phases of the evaluation — distilling the findings from the data and communicating them to those who need to know.

These are topics for this and the next section of the *Guide.* Please regard these sections merely as introductions to the various technical, conceptual and political issues which arise at the "back-end" of the evaluation. Do seek further guidance from books and from live evaluation experts.

It is often assumed that the process of analyzing data — whether they are participant responses on surveys or interviews, whether they are observer tally sheets, or whether they are compilations of data from records,— is primarily a technical one.

Technical skills are necessary in analyzing data. Formal evaluations should have the services of an expert. Informal evaluations should, where possible, consult with an expert at this stage of the evaluation. When analyzing quantitative data, for example, someone with knowledge and experience should supervise the entry of the data into the computer and prescribe the relevant calculations and statistical analyses. When analyzing qualitative data, for example, someone with knowledge and experience should review transcripts and code the data into categories.

Although technical skills are necessary they are not sufficient for generating findings. Conceptual skills are also needed. In many cases, the data analysis does not lead to "self evident" findings, but must be interpreted in the light of additional information about the context and the circumstances.

Technical and conceptual skills must be supplemented by political understandings. To make interpretations and to generate recommendations for next steps — which, after all, are the payoffs for doing evaluations — political understandings about what is useful and feasible in a particular situation are also essential.

Analyzing Quantitative Data

Many statistical techniques can be used to analyze numerical data, and the books listed in the References section may be helpful. However, especially in informal evaluations, the simplest computations are often best.

Counts by Categories. The simplest, most frequently used way of analyzing survey data is to do a tally or count of how many people or responses are in a particular category and report the results in percentages.

For example, respondents to a survey might be described as 60% women and 40% men. Or, they may be described as 40% first time participants, 50% those who attended once before, and 10% those who attended more than once. Respondents' answers about how satisfied they were with the program might be reported as 20% highly satisfied, 40% somewhat satisfied, 20% somewhat dissatisfied, 10% highly dissatisfied, and 10% no opinion. This might be cross-tabulated by reporting, for example, the percentage of women who were both first time attendees and highly satisfied. This figure could be compared to the satisfaction level of women who had attended before

Averages. Getting the average from a set of numerical responses tells you how the group thinks, but masks the fact that there are outliers who think differently from the group.

Median. The median is the midpoint, with half the scores being higher and half lower than the median score. The median tells you about the range of responses.

Mode. The mode is that score given by most people. It represents the most frequent or most usual response.

Displaying counts, averages, medians, and modes in the form of bar graphs and pie charts is very helpful and easily done on the computer (See Figure 29 a,b,c,d).

Analyzing Qualitative Data

Analyzing qualitative data that are words, quotations, or stories can be done in many ways. Find out more by consulting books or experts.

Content Analysis. Content analysis is a technique for changing words into numbers by counting the times a word, phrase, or idea appears in a particular text. There are many technical considerations in selecting the text or the part of the text to be analyzed, and the methodology for reliable counting requires expert assistance.

Matrices. Matrices display comments visually. After reading several times through the answers to open-ended questions, interviews, or focus group transcripts, you get a sense of the categories within which you can classify most of the responses. For example, if you have asked people why they come to an event and you find that there are four clusters of reasons, you could make a chart with the reasons across the top row and some other variable like age down the first column, and then put representative quotes in the boxes (See Figure 30).

Summarizing, Comparing, and Contrasting. Summarizing, comparing, and contrasting are all ways of finding the themes, patterns, and relationships contained in qualitative data.

When you have notes or transcripts from interviews, focus groups, discussions, or case studies you have to make sense of what people have told you and synthesize it. One way to do this is to take all the material and read it through several times. Then, take colored pencils and underline in one color all the quotes which seem to relate to or express the same idea. Group these together and give them a name. Several people doing this independently are likely to come up with somewhat different groupings and names. The ensuing discussion is likely to lead to an exclusive and exhaustive set of categories into which all the data fit. There are computer programs which simplify this task, but ask an expert for advice because there are many choices.

Generating Findings

Making inferences or drawing conclusions from data is easier when data from different instruments all point in the same direction. For example, you might learn from both questionnaires and interviews that everyone thought a program was exactly what they wanted, that all details were handled in a quality manner, and everyone could demonstrate the skills they were taught.

However, when some people valued a program and others didn't, or when some people could demonstrate a skill and others couldn't, an evaluator has to figure out what distinguishes those who liked the program from those who didn't; what distinguishes those who learned the skill from those who didn't; or whether there was any relationship between liking the program and learning the skill.

For example, if there is a positive relationship between satisfaction and skill learning, you might infer that if there had been more practice opportunities for those who didn't learn the skill, they might have learned it and, therefore, liked the program better. Or, you might infer that if the program was more to their liking, people would have been more attentive and, therefore, learned the skill.

Making such inferences depends on one's experience in working with data, with people, and with the program content. Sometimes data confirms what people already know and, therefore, provides welcome support for their opinions. If the data are different than expected, check out the surprises. Keep asking questions and asking others for their interpretation until you are satisfied that supportable findings have been made.

In a formal evaluation with an outside evaluator, generating findings from the data is usually done by the expert. However, because evaluations are so situation specific and context dependent, this person should be open to alternative interpretations from the evaluation committee and others.

Interpreting data requires technical and conceptual talents, and often depends on experience and insight as much as it does on analysis techniques.

Interpreting Findings

Sometimes when evaluation findings are presented to a group, one person will say they are obvious, another will say that they are news. One person will comment that the findings are wonderful considering all of the difficulties that the program faced. Another person will say that they are disappointing in that the program did not meet expectations.

These people are using different criteria to make their judgments. The first person says that she is satisfied that the program did as well as it could under the circumstances. The second person says that she is dissatisfied because the program did not do as well as she had hoped it would. Both positions are justifiable; each focuses on a different attribute of the findings.

Findings from a program evaluation are often complex. For example, you may find that the program attracted a large audience, but not the audience originally intended. Or, the program was loved by some and left others indifferent. Or, the program impacted some participants a great deal and they changed their behavior as a result; others remained in the place they started.

How funders, policy makers, or providers balance the findings — coming either from a formal or an informal program evaluation — may be influenced by their initial expectations and what they regarded as attainable outcomes. The findings may be seen as program success by one and as failure by another because people value the various pieces of evidence differently.

It is helpful to have open discussions about how, collectively, to weigh the set of findings. In the absence of a such value clarification process, people's interpretations of findings may be based on their own idiosyncrasies, such as their tendency to judge leniently or severely.

To clarify value judgments with a group, reality-test by asking:

> *What is realistic to expect from this program, given its goals, population, structure, duration, activities, and costs? What is the maximum that could have been expected? What is good enough? Minimally acceptable? Unacceptable?*

To clarify value judgments with a group, rank-order by asking:

> *How should these findings be weighted? Which findings should be seen as most important? Less important? Least important? Which findings should most influence our judgment of the program? Which should not influence our judgment at all?*

To clarify value judgments with a group, imagine what-ifs by asking:

> *What if the findings were different in the following ways? Would that change your views? At what point would your views change?*

Making Recommendations

Evaluation experts differ as to who should formulate recommendations based on the findings.

- ▲ Some experts assert that the responsibility of an evaluator and of the evaluation committee ends with the formulation of findings. They see that making recommendations is a task for policy makers who, combining the findings with information from other sources, come up with their preferred course of action.
- ▲ Other experts assert that the evaluator and the evaluation committee have become knowledgeable about the program and should recommend subsequent courses of action for consideration by decision makers.

Each program evaluation situation is unique. The outside evaluator, the evaluation committee, and the decision makers should discuss in advance how they prefer that recommendations be developed.

Written recommendations, whether they are formulated independently by the outside evaluator or jointly by some group, can either become part of the final evaluation report or may be bound as a separate document, depending on the preferences of the evaluation committee, the evaluator, and the decision makers.

Figure 29a

EXAMPLE: TABLE

(Note: Data are fictitious. Created for illustrative purposes only.)

SELF-REPORTED BEHAVIORS

	Pre-Program	Post-Program
Non-Holiday Synagogue	Frequent - 20%	Frequent - 30%
	Sometimes - 40%	Sometimes - 25%
	Rarely - 40%	Rarely - 35%
Home Observance	Frequent - 35%	Frequent - 40%
	Sometimes - 50%	Sometimes - 45%
	Rarely - 15%	Rarely - 15%
Reading about Current Events in Israel	Frequent - 40%	Frequent - 40%
	Sometimes - 40%	Sometimes - 50%
	Rarely - 20%	Rarely - 10%
Conversations on Jewish Topics	Frequent - 70%	Frequent - 85%
	Sometimes - 20%	Sometimes - 15%
	Rarely - 10%	Rarely - 0%

Figure 29b

EXAMPLE: PIE CHART

(Note: Data are fictitious, created for illustrative purposes only.)

Non-Holiday Synagogue Attendance

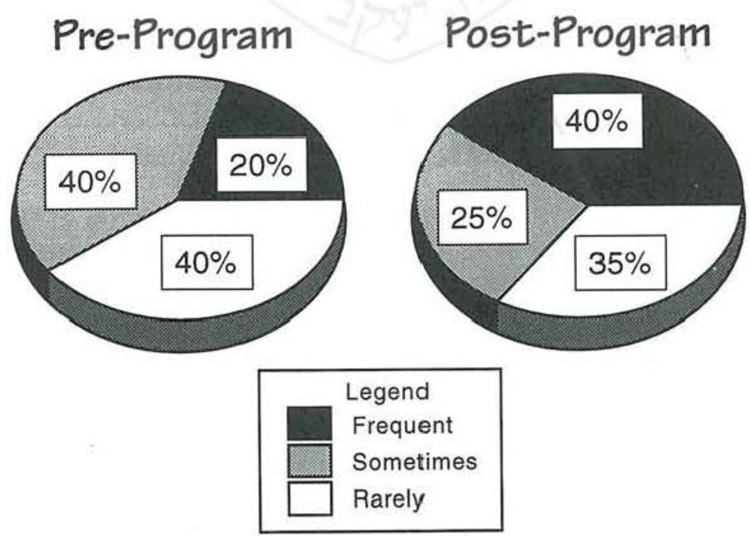

Figure 29c

EXAMPLE: BAR GRAPH

(Note: Data are fictitious. Created for illustrative purposes only.)

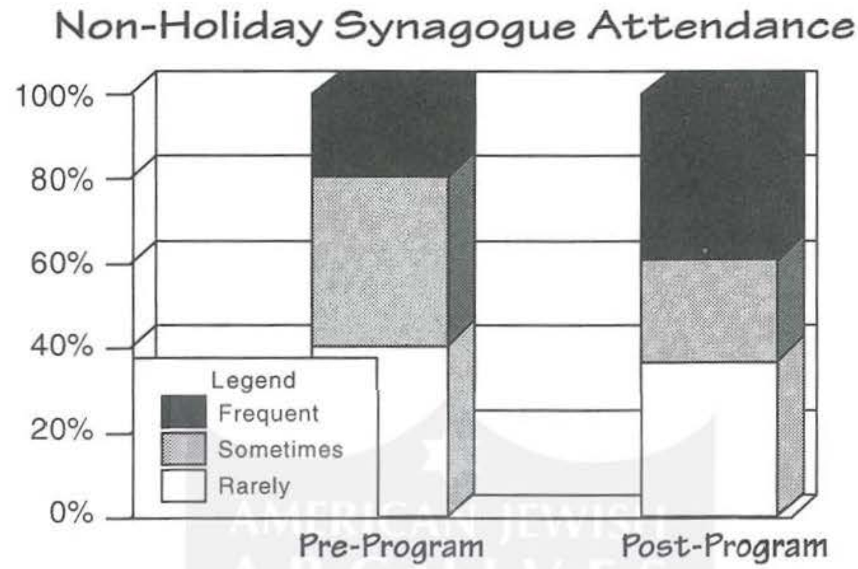

Figure 29d

EXAMPLE: FINDINGS

(Note: Data are fictitious. Created for illustrative purposes only.)

From the data given in Figure 29 a, b and c, the following statements might be generated.

- Synagogue attendance appeared to increase somewhat after the program. It appeared that those who had attended "sometimes" reported attending more frequently. There was little change for those individuals who "rarely" attended.
- Home observances also increased after the program. Here again, as with synagogue attendance, the movement appears to be from the group of "sometime" observers who became "frequent" observers. There seemed not to be change for those who "rarely" participated in home observances.
- The program seemed to affect most those who had previously been less interested in Israeli current events, who now either became "sometime" or "frequent" readers about such things. It should be noted, however, that there have been several severe crisis situations in Israel and a great deal of reporting in the American media, which may have been even more important influences on this variable than the program itself.
- In terms of conversations about Jewish topics, the program seems to have been a resounding success. Everyone reported that they had conversations about Jewish subjects "sometimes" or "frequently."

Figure 30

EXAMPLE: OPEN-ENDED RESPONSES

(Note: Data are fictitious. Created for illustrative purposes only)

These are responses to the question: "What were the major positive influences, as you were growing up, on your Jewish identity as an adult?" % indicate respondents mentioning this influence. Quotes are illustrative of what people said. Subheads classify the quotes.

FAMILY 80%	**PARENT:** My grandfather was the single most important influence on me — he told stories and took me to synagogue. **PARENT:** My mother was such a good person — always helping other people and saying that is why we were put on this earth. **SPECIAL EVENT:** I remember big family events where everyone came — and there was singing and the table was so beautiful with candles and flowers. **DAILY LIFE:** Our family was not very religious, but at the dinner table we always talked politics and whether it was good or bad for the Jews.
SCHOOL 40%	**SUBJECTS:** Unlike most kids, I loved going to Hebrew school because I loved learning Hebrew. **PEERS:** School was great because there was a great bunch of boys who used to play around in the halls and always get in trouble. **SUBJECTS:** When I was little, I was very quiet and didn't talk much. I remember sitting in the back of the classroom and learning about Moses. I thought he was wonderful. **TEACHERS:** I went to day school and had some terrific teachers who took us on field trips to lots of places in the city.
CAMP 25%	**FRIENDS:** I made friends that I have to this day. **JUDAICA:** I remember how much I loved Shabbat at camp. **JEWISH ATMOSPHERE:** I was so homesick at camp that I hated it. But, I remember thinking how smart everyone was and how good at sports and how nice it was to be with Jewish kids. **COUNSELOR:** One year I met the best person I ever had known up till that time. She was kind and could play such great music and she was so into her Judaism.
YOUTH GROUP 20%	**FRIENDS:** I made friends that I have to this day. **ACTIVITIES:** I became a leader in my youth group and I've been a leader ever since. It affected my whole identity, not just my Jewish identity. **PEERS:** It wasn't that we did Jewish things although we did that. We did fun things. Everyone liked one another. No one was left out. **STRUCTURE:** It gave me a place to hang out. We met in the synagogue and so that became a friendly place for me.
ISRAEL TRIP 15%	**JEWISH SENSIBILITY:** I never saw so many Jews all together doing so many different kinds of things. **JEWISH PRIDE:** It's amazing when you think of it — so much has happened in 50 years. We're an energetic people. **JEWISH SENSIBILITY:** I didn't like it as much there as in America — but I was glad to know that there was a place where everyone could go if they needed to. **JEWISH HISTORY:** I couldn't believe how much I didn't know about Jewish history. I started reading about it and I haven't yet stopped.

Communication and Action

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Communication and Action

The success of any program evaluation effort should be measured by three attributes: its **quality**, its **credibility**, and its **utility**. Each factor influences the others.

- The **quality** of an evaluation, particularly a formal evaluation, depends on how the evaluation is managed and on the technical aspects of data collection and analysis.
- The **credibility** of an evaluation, whether informal or formal, depends on how the evaluation is conceptualized and how clear and convincing the findings are to stakeholders.
- The **utility** of an evaluation depends on whether the findings and recommendations turn into decisions that not only are implemented but have the desired effect.

Evaluations can polarize opinions, or they can bring people together. Evaluations can be viewed as cynical instruments of those with power who use them to accomplish their predetermined ends. Or, they can be viewed as genuine attempts on the part of everyone to learn together from shared experiences.

The extent to which people are informed about, and involved with, the evaluation from its inception to its conclusion is the single most important influence on the quality, credibility and utility of the evaluation. When communication is withheld, misleading, or rumor-laden, evaluations can do a great deal of harm. When communication is open, complete, and timely, a sense of trust and partnership develops. This is not to say that all anxieties and resistances will be permanently laid to rest; but, a space for resolving them can be created that will keep them manageable rather than explosive.

Dealing with the interpretations of findings, the making of recommendations, and the writing of the final report is the trickiest part of insuring the success of the evaluation.

Reporting Plan

A reporting plan should be formulated by the evaluation committee, early in the life of the evaluation.

- **Notification:** It is usually important to do early notification for people that an evaluation is in process and how it may affect them. They should be routinely updated.
- **Progress reports:** The reporting plan should consider how boards, policy makers, and funders, as well as program providers, program participants, and others will be kept informed about the evaluation as it starts up and proceeds.
- **Feedback:** It is also important to provide feedback and to thank those who complete survey forms or participate in interviews or focus groups.

The reporting plan should specify who should tell whom about what, and at what level of detail, during and at the conclusion of the evaluation.

- Verbal presentations should precede the distribution of written documents. Generally, people closest to the program should hear about the findings before policy makers do. It is helpful to decide in advance who should make the presentations, whether an outside evaluator, a professional, a lay leader, a program provider, or a program participant.
- As written findings and recommendations are made public, the media, professional colleagues, and possible future funders who might be interested in the program also should be informed.

Discussions and Briefings

In informal evaluations, the discussion of evaluation findings usually happens face-to-face among people who work together. Under these circumstances, everyone should be cognizant of issues related to confidentiality and privacy. The confidentiality of participant reactions, whether critical or complimentary, analytic or emotional, should be respected. As for privacy: people's views or comments should never become gossip or discussed in inappropriate ways. In formal evaluations, periodic briefings should be provided to stakeholders (including participants) about the evaluation findings. These briefings should be scheduled at appropriate times and should be prepared carefully.

Since program evaluations are sometimes seen as commentary about the work of individuals, care should be taken in framing the briefings. Briefings should connect what is being reported to the original purposes of the evaluation, to the data which has been collected, and to the findings based on that data.

During briefing sessions, people may offer opposing interpretations of findings. While some of their ideas already may have been dealt with during the evaluation, briefing sessions often become the occasion for further debate and dispute. There are several options for handling disagreements, which arise during briefing sessions. Which option to take should be decided by the evaluation committee, the outsider evaluator, or both together (see Figure 33).

Figure 31

ALTERNATIVE WAYS TO MAKE RECOMMENDATIONS

INFORMAL EVALUATION

Program providers, evaluation committee, and other stakeholders discuss findings and make recommendations that are submitted to policy makers for discussion and approval.

Program providers, evaluation committee, and other stakeholders present findings to policy makers for joint formulation of recommendations.

FORMAL EVALUATION

Evaluator submits findings to policy makers. Has no role in making recommendations.

Evaluator makes recommendations independently, based on findings, and submits to policy makers for discussion and approval.

Evaluator and evaluation committee, with or without program providers, makes recommendations based on findings and submits to policy maker.

Evaluator organizes series of "findings and feedback" sessions to get reactions and evolve recommendations collaboratively.

Progress Reports

These may be written by the evaluation committee, the outside evaluator, or the program providers. Sometimes, funders' or policy makers' requests for progress reports are general with a few guiding questions; sometimes, their questions are very specific.

Final Report and Next Steps

Many funding agencies request that final evaluation reports follow a particular form. Others leave the format up to the program providers, the outsider evaluator, or the evaluation committee.Final reports for boards or other interested stakeholders may vary a great deal, although they usually contain some standard sections. The Executive Summary is the part of the report most frequently read. A separate Technical Report may include a detailed description of the evaluation methodology along with instruments and a description of respondents. Most final reports have sections that include Findings and Recommendations.

The Final Report should not be the final step in any evaluation. Decisions and actions should be the next steps.

As noted earlier, formative evaluations — either informal or formal — should contribute to decisions about program modification. Suggested or stimulated by the evaluation, these might involve changes in program length, curriculum, instruction, duration, staffing, administration, or oversight mechanisms. Changes might be needed in publicity, marketing, record keeping, or evaluation procedures.

Summative evaluations — usually formal — should contribute to decisions about defunding, refunding, expanding, or disseminating a program. If the program is to be expanded or disseminated, program planning for the next round will have to include procuring the additional funding to make this happen.

Figure 32

ALTERNATIVE WAYS FOR HANDLING DISAGREEMENTS ABOUT FINDINGS OR RECOMMENDATIONS

Likely To Have Negative Consequences

1. Ignore opposition.
2. Pay only lip service to dissenting views.
3. Silence the opposition by force of argument.

Likely To Have Positive Consequences

1. Air and explore sources of disagreements. They may be resolved differently depending on whether they are related to issues of quality, credibility, or utility.
2. Ask dissenters to draft the specific wording they want to substitute. Consider language modifying text or adding footnotes.
3. Ask dissenters for written statements of opinion. Consider adding them to report as attachments.

Figure 33

OUTLINE OF PROGRESS REPORT

General Questions

Relative to the last reporting period, please explain in detail...

1. What have been the major activities of your project?
2. What have been your project's achievements?
3. What have been problems for your project?
4. How have you dealt with these problems? Which remain unresolved? How will you resolve them? What consequences might they have?
5. What do you anticipate happening during the next reporting period?

Specific Questions

Relative to the last reporting period, please explain in detail...

1. To what extent are you achieving the goals as stated in your plan? What are the differences between the plans and current realities?
2. To what extent are you doing the activities as anticipated in your plan? What are the differences between the plans and current realities?
3. What management problems do you have in relation to staffing? Funding? Scheduling? Publicity? Marketing? Technology? Relationships with other institutions? Other? What did you do about them? What management functions went well?
4. What are specific project accomplishments? How do you know? What do you use as indicators of success?
5. What are project difficulties? How are you dealing with them?
6. What positive impacts or influence has the project had on people, events, or institutions? How do you know? What is your evidence?
7. What negative impacts or influence has the project had on people, events, or institutions? How do you know? What is your evidence?
8. What "next steps" do you anticipate for the project? Why?
9. What individuals or institutions should become acquainted with this project at this time? What is important for them to know?
10. What suggestions do you have for those undertaking similar projects?

Figure 34

OUTLINE OF EVALUATION REPORT

(NOTE: When writing an evaluation report always consider your readers. Their preferences dictate the length of the report, the tone of the writing, and the amount of information provided. You want to write a report that demonstrates the quality of the evaluation, is credible to readers, and useful to decision makers. Sometimes the technical information may be summarized in the Report with details in an Appendix or in a separate Technical Report. Remember that the Final Report may have a long life and wind up in unexpected places.)

TITLE PAGE AND INTRODUCTORY MATERIAL:

Title and author. Acknowledgments. Table of Contents. Preface with explanation of program or evaluation background, report authorship, report distribution, confidentiality, and other issues of significance.

EXECUTIVE SUMMARY:

A less than three page summary, which includes brief descriptions of evaluation purpose, design, major findings, recommendations, and next steps. (Although this appears first in the document, it is usually written last. It may take a long time to compose since it is likely to be widely distributed and quoted.)

PROGRAM DESCRIPTION:

A brief description of the program — its genesis, rationale, goals, activities, duration and frequency of sessions, institutional setting and relationships, staffing, administration, governance, target population, funding, and other important characteristics.

EVALUATION DESCRIPTION:

Purpose for the evaluation. People responsible for organizing and carrying out the evaluation. Evaluation planning process. Duration. Costs. Evaluation questions and justification.

EVALUATION DESIGN:

Data collection. Description of instrument selection and instrument development. Sample description and justification. Scheduling. Procedures.

EVALUATION FINDINGS AND INTERPRETATION:

Data Analysis. Findings. Interpretations.

EVALUATION RECOMMENDATIONS AND NEXT STEPS

APPENDICES OR TERMINAL REPORT:

Methodology description. Instruments. Data presentations. Evaluation Budget. Evaluation Personnel.

Informal Evaluations of Jewish Programs: Q&A

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Informal Evaluations of Jewish Programs: Q&A

Informal evaluations are occurring with increasing frequency in Jewish settings. Who is responsible for this awakening appreciation of informal evaluation? At least four groups of people are contributing to this trend:

1. **Foundations and other donors** who provide grants for new programs want to know how successful the new programs are.
2. **Members of the board in synagogues, schools, federation and agencies** who want to know how successful their already operating programs are. Sometimes their interest is driven by the need to cut costs. Sometimes their interest is driven by the desire to increase participation. Sometimes their interest comes from complaints they hear that "business as usual" is not working.
3. **Program providers** — especially those working in the emerging "continuity" areas such as family education, adult education, Israel trips, and outreach to intermarrieds or new populations — who are curious about why their programs did or did not attract and retain an audience.
4. **Program consumers.** People - congregants, parents, young people, almost everyone — are becoming increasingly selective about how they spend their time. They want to know that programs or events are of high quality and of high interest to them before they will come. Even after they come once, they may not continue to come unless they have very positive impressions.

As the following questions and answers reveal, new ways of thinking can greatly increase what is learned through informal evaluation without greatly increasing the cost of doing informal evaluations.

Question #1

I collect short questionnaires after every program I do. People get tired of filling them out. After looking at them quickly, I throw them away. What should I do differently?

Answer:

The forms themselves may reveal that you do not regard them as a serious form of feedback, and, therefore, people, including yourself, see them as a waste of time. If you seriously want feedback from your participants, you have a few choices.

- *Build in ten minutes of feedback discussion into the program itself, perhaps using some of the sentence stems in the Evaluation Go-Rounds.*
- *Or, continue to use written feedback with these sentence stems as trigger questions.*
- *Think about what you really want to know from participants, so that you can adapt the program to their needs. Put these questions on your feedback form.*
- *Call several people on the phone to ask them their own reactions and what they think others felt.*

If you are really serious about hearing from your participants, stop what you are doing and do something different.

Question #2

I have a program committee that is organizing an adult education series. How should I get them to "think evaluation" along with me?

Answer:

Good question. Start by really pushing them on what they want to happen as a result of this adult education program. Some will probably say "good attendance", "dynamic speakers", or "people really turned on to learning".

Ask them again how they could tell whether that was really happening: What would you hear people say or see them do? Finally, ask how they want to capture this feedback:

Attendance records? Surveys? Interviews? Focus groups?

Finally, ask them what data on each of these would really make them happy: 80% continuing attendance? 60% approval of topics? Excitement about continuing to learn?

Question #3

I want to know how to make our educational resource center more attractive to more people. Does evaluation have anything to do with this?

Answer:

Sure it does. You probably need to get information on what is currently happening at your resource center. This requires data collection and analysis dealing with people's awareness of your services, the convenience of your services, and the usage of your services across different target populations.

You probably also want to get information about what people's needs and wishes are. This requires feedback about what resources they need in their work, where they presently go to get them, what they would like in your center, and other such questions. Evaluation methodologies are certainly appropriate and relevant here.

Question #4

I want my four-session family education program to increase families' home observances. I can't be in their homes. How can I find out whether that has happened or not?

Answer:

First, make sure that you have built supports into your program to encourage this to happen. Teaching them the Shabbat blessings and telling them about the reasons to do this every Friday night is probably not sufficient to change anyone's behavior. Even if they wish to, individuals often have trouble breaking old habits and starting new ones. Not all family members may wish to do the same things.

Some supports might be: helping the family to plan together what they will do and to making a formal commitment to it; partnering families so that they will remind and follow up with one another; and sharing feedback about what they did at home to each session.

Some ways to reinforce their learnings are for families to keep journals or checklists of what they did either during or after your program or for you to phone families after the end of the program to ask about their observance.

But, it is unlikely that four sessions will substantially alter people's behavior. Four sessions are more likely to motivate, build skills, or change attitudes. You might figure out how to evaluate whether or not the program impacted these on-route attributes.

Question #5

We're trying to train our teachers to use more innovative classroom practices so that children in school will learn more and like school better. How do we know whether we are successful?

Answer:

Training programs should be set up so that you evaluate each link in the chain that leads from the training of teachers to impacts on children. There is likely to be much slippage along the way.

You should check — by responses in writing or in simulated enactments — that teachers really do know how to implement the innovative practices at the nuts and bolts level.

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Then, you should check to see if they really want to do so and are willing to overcome all the impediments of inertia that generally stand in the way of change, such as fear of failure and the trouble of rethinking their classroom routines. You have to give them a safe space to practice, to get support and guidance from one another and from the trainer, and to do this again and again, until the innovative ideas become familiar and routine.

Then, you should check either by observing them in action or being told about them in detail whether, in fact, the innovative ideas have made it into the classroom.

Finally, you should get feedback from the students in the way of questionnaires or interviews, which give you self-reports on their learning and liking, or by tests or attitude surveys, which will give you a basis of comparison with students in other classes.

Question #6

We have a synagogue young adults program. Basically, our long-term goal is to have more Jews marry other Jews. How do we evaluate our program?

Answer:

You are not likely to be able to directly connect what happens in your program to your long-term goal, since your long-term goal will be influenced by many more powerful factors in the lives of young people than your one-time program.

So, you have to choose goals that are more within your reach and seem to you to lead to your larger goal. Try for these immediate goals and assess whether you have gotten there.

Since you are working with young people, you probably want to increase the pleasure they have from doing things in a Jewish way. Or, you may want to increase the number of Jewish friends they have. Or, you may want to increase their awareness of activities in which they currently are interested with being Jewish, such as music, movies, social action projects, the environment, and health.

You should select short-term, do-able goals and evaluate whether you have achieved them by listening to what your participants tell you.

Question #7

I want to know what successes and problems our foundation's grantees are running into as they move through their multi-year educational projects. What should I be asking the grantees to tell me about?

Answer:

This is a difficult area because of the built-in institutional tensions between grantors and grantees.

Grantors have traditionally done their "evaluations" of grantees at the proposal review stage and have given grants to those who "passed" the review. Then, they have asked only for interim and final reports to make sure that people were doing what they said they would do with the funds.

Grantees often worry that, if they are honest about the problems they encounter or the challenges they are facing, the grantor will cut off their future funding. As relationships move towards a partnership notion, and trust develops on both sides, funders should be able to ask for and grantees should be able to give more open complete information. Since your projects are already multi-year funded, you perhaps can do this already.

During the first year, you probably want to know about what grantees encountered as surprises, unexpected challenges, and as-yet-unmet needs, along with what they regard as successes. You may want them to be very specific, if you are able to provide them guidance in resolving these issues. Or you may only want them to tell you how they plan on handling these emerging issues.

As the projects move along, you probably want to find out the extent to which they are meeting their goals, the impact they are having on participants, and the lessons they themselves are learning.

You are able to demand more of this kind of information if you have urged them up front to submit an evaluation plan and/or engage an outside evaluator.

Question #8

How do I find out if our three-year program for training avocational teachers is working?

Answer:

First, you have to define for yourself and others what "working" means. As you do this, you may find that those involved with the program have many different ideas about this.

For some, it may be enough that you have helped identify avocational teachers and have gotten them into classrooms to fill empty "slots." For others, it may mean that you have provided good guidance for avocational teachers in the way of pedagogy and subject matter so that they are at least as good in the classroom as current teachers. For still others, it may mean that you have produced a cadre of teachers who meet high standards for teaching performance.

Once you have ironed out what you want the program to have accomplished, you can develop an evaluation plan that includes a variety of interviews, focus groups, and observations.

Question #9

We have a leadership training program that started out great but participation and enthusiasm in now falling off. How do we evaluate it to see what is going on?

Answer:

The people to ask are the people who are involved in the training — both those who remain motivated and those who are becoming less motivated. You could schedule interviews with them, and you could observe them at the leadership meetings.

You may check out certain hunches, such as the following:

- ▲ *The program itself may not of sufficient quality to keep everyone interested. Perhaps people want action and involvement, and the program is mostly talk.*
- ▲ *Or, the program is too long and drawn out and doesn't appear to be going anywhere. People are busy these days and always have competing obligations. If they are not getting continuing satisfaction from the program, no matter what their original obligation was, they will not stay.*
- ▲ *Another reason why the participation and enthusiasm may be falling off is that the participants in the program haven't bonded with one another. Usually, programs of this kind are sustained by the friendship, rapport, and sense of community that develops. If that glue is not present, interest falls off. You should check out whether there is something different going on in terms of friendship patterns for those people who seem to remain enthusiastic as compared to the others.*

When you do your interviewing, you should be sure to ask people what they would suggest changing about the program to make it better for them. You should test out some of your own ideas with them and see what appeals to them.

Question #10

We have a project where we use computerized distance text study and where we foster E-mail connections for our rural, Jewish young people who live at great distances from one another. We want to find out who we're appealing to and whether our programming is making any difference in their lives. How do we do this without spending much money?

Answer:

You've got a built-in evaluation capacity in the computer.

You can enter a questionnaire as part of the text study and you can query people via E-mail. You can either ask them directly about the influence of the programming on their thinking, attitudes, or actions or get them to give you for-instances or stories. Or, you can be more indirect and ask them to respond to a simulated situation and explain their responses. Or, you can find or create an attitude scale that gets at what you are teaching them and asks them to answer at three-month intervals throughout the year. Or, you could abandon the high-tech approach and phone interview those young people who you know to be articulate and good observers and ask them about what is going on. Get them to suggest other people with whom you might speak.

Formal Evaluations of Jewish Programs: Examples

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Formal Evaluations of Jewish Programs: Examples

Overview

Formal evaluations, conducted with the services of outside evaluators, are becoming more common in the Jewish community as skilled evaluators are becoming more available. Professionals in foundations, federations, synagogues, schools, agencies, departments, and youth organizations are asking such evaluators to think with them about how to organize their own evaluation systems. In turn, the evaluators are encouraging projects and programs to become more sophisticated about doing both informal and formal evaluations.

The cases presented below describe briefly aspects of various evaluations conducted in Jewish settings. In some instances, details have been omitted or changed, or composites have been created for illustrative purposes.

Cases 1 through 5 are based on my experiences with programs. Cases 6 and 7 were written by Adam Gamoran, Ellen Goldring and Bill Robinson. Case 8 was written by Leora Isaacs.

Case 1: Evaluation of Multi-agency Program Planning

General comments

It is useful to evaluate the program planning process as well as the program. Bringing in an experienced trusted evaluator to collect useful information about a complicated multi-agency planning process not only adds a valuable colleague to the planning team but helps identify potential trouble spots before they cause major problems. This case describes the start-up and first year of a three year evaluation process. The evaluator acts as a technical assistant during the project's inception.

Program description

A three year pilot project is being organized by three agencies - a pre-school, a synagogue, and a bureau of Jewish education. Their three common objectives are:

1) to increase the Jewish knowledge of interfaith families with pre-school children,
2) to motivate the parents to consider on-going Jewish education for both their children and themselves, and
3) to increase family participation in synagogue life. The first year of the program is to be devoted to creating and planning the program, and the next two years trying it out with families.

Evaluation purpose

The donor wants to be kept apprised of what is being accomplished each year. At the end of three years, she wants to be able to make a decision about whether to cancel, modify, continue, or expand the program.

Framing the evaluation

The donor decides to hire an outside evaluator for three years, paying that person $3,000 each year along with $2,000 of expense money to be divided over the three years. The evaluation contract is to begin at the same time as the planning for the project. Semi-annual evaluation reports are due, and the final report is due six months after the end of the project to allow for follow-up with the last round of participants.

After interviewing several evaluators, the donor and the three partner organizations agree on an individual with experience in organizational development, Jewish education, and interfaith families, whose skills are in qualitative data collection.

The evaluator will be responsible to the donor, but will work with an evaluation committee composed of administrators from the three agencies, teachers in the program, and a few parents.

The evaluator, working with the committee, develops a proposal for the first-year formative evaluation to track the planning and start-up process. He intends to answer the following questions:

- ▲ What was the process that created the pilot program?
- ▲ How was leadership and teamwork established among the agencies?
- ▲ How did decision-making, communication, and coordination occur?
- ▲ What were major successes of this process?
- ▲ What were major problems?
- ▲ Does the program being planned seem to have all the necessary elements to accomplish its goals? What is missing?
- ▲ What else should be done to make it more likely that the planned program will accomplish its goals?

Collecting data

The evaluation proposal calls for the evaluator:

- ▲ To observe the planning meetings
- ▲ To interview each of the planners
- ▲ To conduct focus groups with prospective parents
- ▲ To analyze the process based on his knowledge and experience

Analyzing the data and communicating the findings

The evaluation proposal requires the evaluator to provide bi-monthly verbal feedback to the major stakeholders and semi-annual written reports to the agencies and the donor. He is to first present drafts to the evaluation committee, agency administrators, and parents to get their views as to the completeness of the data, the credibility of his findings, and the usability of his recommendations.

Case 2: Organizing a School Self-study

General comments

Schools are complex institutions. Many stakeholders claim "ownership" of schools and the right to be heard about how children are to be educated. Schools, then, by the nature of their calling, must themselves be "learning organizations" and be engaged in continuing self-study on various aspects of their functioning. On-going evaluation should be a part of every school administrator's job responsibility. This case describes the way in which an evaluation was initiated in one school.

School description

This supplementary school, grades K-10, has forty-five, part-time American and Israeli teachers with varying levels of pedagogic skills and Jewish knowledge. Some classroom instruction is interesting, and some is boring and unimaginative. There are general curriculum guidelines and instructional resources for teachers and periodic staff meetings. Students, typically tired in the afternoons, are more interested in socializing than studying. Parents — some single parents, some two career families — are typically stressed, and their own Jewishness may be of peripheral importance. The school board meets monthly. This year, there is a new Chair, somewhat uncertain of her role. She is, however, committed to improving the school, and she calls for a self-study to start the process. She obtains a small contribution to underwrite some self-study expenses.

Evaluation purpose

In a meeting between the school administrator and the Chair, it is agreed that an in-house evaluation will be done, resulting in recommendations that will deal with parent, student, and teacher complaints.

Framing the evaluation

- ▲ The administrator decides that the evaluation will be done over the course of one school year and that an intern will be paid for up to five hours a week to help with administrative details.
- ▲ The administrator decides to make the evaluation high profile and visible. figuring that there will be payoffs to the school from the evaluation process itself, which will establish the school as committed to self-improvement, as well as from the outcome of the evaluation, which will describe those areas needing change and also publicize where it is doing well.
- ▲ The administrator decides to form an evaluation committee including teachers and parents to oversee the evaluation process. This will help build teacher commitment to solving problems that they themselves identify and will assure parents of the credibility of the process. The Chair and several members of the school board also will be members. The Chair will routinely keep the synagogue board apprised of what is happening.

At future meetings of the evaluation committee, additional analysis will be made about data collection, data analysis and interpretation and how to translate the findings into action.

At its next meeting, the evaluation committee decides on various ways to collect information.

- ▲ Teachers will brainstorm their issues at a staff meeting.
- ▲ Parents will participate in focus groups.
- ▲ Someone has found in a pedagogic journal a short questionnaire for students, which asks them about their perceptions of school climate, their relationship with teachers/peers, and their satisfaction with what they are learning.
- ▲ The upper grade teachers will have their students spend fifteen minutes of class time filling it out.

At the first meeting of the evaluation committee, the committee decides to narrow the evaluation to the following issues:

- ▲ How can classroom instruction be changed to make it more interesting and more important to students?
- ▲ What supports do teachers need to improve their teaching?
- ▲ What can be done to increase the involvement of parents in their children's Jewish education?

Case 3: Evaluating a Four-day Conference: The Whizin Institute for Jewish Family Education

General comments

Multi-day residential get-togethers — workshops, conferences, seminars, colloquiums, conventions, kallahs — are a common format for Jewish groups. They have many purposes, among them information-exchanges, skill-building, problem-solving, networking, action-planning, and advocacy. Evaluation can help organizers clarify their goals, make their agendas consistent with their intended outcomes. improve their sessions day-to-day, and learn what to do next time around. This case describes an on-going evaluation of each recurring training event.

Institute description

The Summer Seminar of the *Whizin Institute for Jewish Family Education* is an annual four-day event for approximately one hundred rabbis, teachers, educators, social and group workers, lay leaders, and parents who mostly attend as four-person teams from their institutions which may be synagogues, schools, or agencies, such as Jewish Family Services or Jewish Community Centers. The *Seminar* runs a complicated fourteen hour-a-day agenda. There are plenary sessions where new perspectives are introduced, track-time where teams meet to create an action plan for implementation back home, Torah L'Shma study experiences, topical Lehrhaus', affinity group meetings, evening field trips, concerts, and recreational activities. The *Seminar's* purpose is to stimulate, motivate, and instruct participants so that they can, whatever their role, do family education programs and activities in their own institutions.

Evaluation purpose

A formal evaluation of the *Seminar* has been conducted by an outside evaluator each year since its inception. In order to adjust the structure and the activities of the *Seminar* to the complex and shifting needs of participants, the evaluation is designed to:

- Ascertain participant satisfaction with the content, organization, pace, and ambiance of the *Seminar* day-by-day and overall
- Describe changes in participant knowledge, skills, and attitudes
- Determine the extent to which participants do family education in their own institutions following their participation in the *Seminar*

Framing the evaluation

Each year, evaluation activities begin when the *Seminar* begins, ending months after the *Seminar* ends, with a follow-up survey of participants. The evaluator talks constantly with *Seminar* organizers and faculty during and after the *Seminar*, summarizing participant responses, end-of-*Seminar* forms, and mid-year reports of the follow-up surveys.

Collecting data

Data is collected through:

- ▲ End-of-session, half-page checklists returned to session faculty
- ▲ Daily journal-type pages — the first day asks for expectations and reactions, subsequent days ask for ratings on each activity or session, and the final form asks for ratings, comments, and suggestions on send-outs, handouts, teaming, programming, ambiance, and learnings, as well as an overall *Seminar* "grade"
- ▲ Evaluator observations at as many sessions as possible
- ▲ Evaluator lunch-table discussions
- ▲ Evaluator on-the-spot and in-the-hall interviews
- ▲ Evaluator analysis of team-produced action plans
- ▲ Follow-up surveys asking about family life activities and action-plan implementation

Findings

Among the *Seminar*-related finding are:

- ▲ Typically, an after-lunch and a second day lull in energy and interest exists.
- ▲ Participants desire more precise information about making course choices.
- ▲ Participants desire more structured opportunities for sharing.
- ▲ Overwhelming support for Torah L'Shma sessions is expressed.
- ▲ There is a need for more instruction and coaching on how to work as a team.
- ▲ There is a need for more guidance and customized consultation in planning actions.

Among the follow-up findings:

- ▲ Participants understand that family education goes "beyond programs."
- ▲ However, programs are still the predominant form of family education, with holidays, Shabbat, and life-cycle events being the most common topics.
- ▲ Family education is well received both by families and by institution and is on its way to becoming institutionalized rather than add-on.

Communication and action

These findings are discussed at daily debriefing meetings, at immediate post-*Seminar* meetings, and at mid-year planning meetings. They lead to overnight changes for each day's programming and substantially modify the *Seminars* from year-to-year.

Case 4: Creating an Evaluation System: The Los Angeles Israel Experience Program (IEP)

General comments

Trips to Israel are regarded as important vehicles in strengthening the Jewish identification of teens and college students. In the past, community support has usually been in the form of need-based scholarships. Now, new institutional partnerships, new programming, and new kinds of financial incentives are being tried out, nationwide, in an effort to send more American young people to Israel. Creating an evaluation system which parallels the program development system can be very cost effective in the long run. Evaluations can sift the workable from the non-workable ideas at a time when these experiments with an Israel experience are still at a very early and fluid stage. This case describes a formative evaluation of an innovative program.

Program description

Formulating the LA Israel Experience Program began with a year long community planning process guided by the Los Angeles Federation's Council on Jewish Life. A fifty person task force —including students, parents, vendors, funders, community leaders, and teachers — met four times to develop the framework for a community plan that was then fine-tuned at a colloquium for about one hundred community members. A decentralized, partnered system was piloted-tested and then implemented. Synagogues used community funding to which they added a small match for incentive grants to their own young people who would go to Israel on an eligible trip and, hopefully, return with renewed enthusiasm for participation in American Jewish life. Grants were also made available to applying institutions who wished to develop pre- and post-trip programming. Administration, publicity, and marketing for the program was centralized within a small Federation office that also had responsibility for developing relationships with corporate sponsors.

Evaluation purpose

A comprehensive system of annual evaluations was instituted with the purpose of fine tuning the IEP over time through careful monitoring and trouble-shooting suggestions. The specific evaluation focus each year would be determined by the IEP implementation committee.

Collecting data

First-year data was collected by phone interviews with rabbis in partnered synagogues to check out the adequacy of administrative arrangements. Questionnaires were completed by returning parents and students to ascertain the extent to which financial assistance was a factor in their decision to go to Israel.

Second-year data is to be collected through focus groups with youth group leaders, teachers, and others in contact with synagogue young people by interviewing young people who did not apply for an Israel Experience grant, conducting site visits to observe grantees doing pre- and post-programming, and surveying parents and returning students.

Findings

Among the first-year findings:

- ▲ High levels of enthusiasm for *IEP* from the synagogue partners were reported.
- ▲ Procedures for synagogue recruitment of students and transmitting funds to them were efficient and easy to manage. This reassured all stakeholders that the decentralized community design supported by a very small *IEP* staff was working satisfactorily.
- ▲ First-year students receiving community funds might already have been motivated to go to Israel. The challenge is to provide the synagogue partners with the attitudes, tools, and skills to seek out the less motivated.
- ▲ Young people and their parents appreciated the financial assistance. Many said that it made the trip possible for them.
- ▲ Young people were willing to do post-trip speaking, but they needed additional training.
- ▲ Computerized record-keeping for *IEP* needed better software so that information could be made more quickly available in easy-to-use formats.

Case 5: Evaluating A Grant Initiative: Hillel's Campus Leadership Initiative (CLI)

General observations

A mechanism used with increasing frequency by funding agencies to stimulate self-directed change within a designated area is that of grants competitions. The granting agency — whether a Federation, Bureau, a community or family foundation, or the national office of an organization with many local units — distributes a Request For Proposals (RFP) to those who might be interested in applying for funding to do a project of their own design. Evaluation opportunities exist at many points in this process, including:

- ▲ Evaluation of applicants' proposals according to given criteria, such as match with the designated area, demonstrated need for the proposed project, quality of proposal relative to clear goals, appropriate activities and structure, and presence of management skills necessary to project success.
- ▲ Evaluation of first-year progress of individual grantees either by grantees themselves or by granting agency. Spotting of emerging implementation problems. Examination of outcomes or impact. Decision-making about assistance and continuing support.
- ▲ Evaluation of second-year progress of grantees either by grantees themselves or by granting agency. Examination of program outcomes and impacts. Decision -making about continuing support. Decision-making about dissemination and replication.
- ▲ Evaluation of the purpose and management of the grants program itself along with its impact. This case describes a program implementation evaluation.

Program description

Hillel's *Campus Leadership Initiative*, funded by a family foundation, was to take place on five campuses and be coordinated by the national office. The purpose of the program was to develop unique programs on each campus to reach Jewish student campus leaders who were not involved with Hillel in order to interest them in personal explorations of their own Jewish identity.

Evaluation purpose

The first-year evaluation of the *CLI* program on five campuses was intended to describe and assess the start-up and implementation of *CLI* on each campus and at the national office so as to produce useful "lessons learned" about project management.

The second-year evaluation was intended to describe and assess the impact of each campus project on participating students, Hillel staff, and Hillel visibility on campus.

Collecting data

Data collection methods used by the evaluator included:

- ▲ Regular phone conversations, individually and in conference, with Hillel coordinator and campus project directors
- ▲ Phone interviews with a sample of student participants on each campus
- ▲ Phone interviews with lay leaders
- ▲ Analysis of student application forms
- ▲ Student end-of-session evaluation forms
- ▲ Student end-of-year evaluation forms
- ▲ Evaluator participation at Hillel Kallah

Findings

Findings about implementation:

- ▲ The national office was critical in the role of coordinator, producer of publicity materials, guider of recruitment, promoter of idea exchanges, and provider of evaluation forms.
- ▲ Recruitment on all campuses was more time consuming than expected and required outreach skills not possessed by all campuses. Recruitment required extensive, personal one-on-one contact. On some campuses student recruiters were more effective; on other campuses, the Hillel Director was more effective.
- ▲ The instructional format that worked best had a speaker or expert introducing briefly new ideas followed by a loosely-structured discussion or experiential exercise. Students wanted a high proportion of air-time for themselves. Lectures or formal instruction did not work well.
- ▲ Those students who formed friendships with others in the group were more likely to attend sessions regardless of the program or topic being discussed than those who were loners or outsiders. The latter attended because of their interest in a particular topic.
- ▲ The program worked best when retreats and other social bonding experiences were introduced early.
- ▲ The program worked best when sessions were curricularized, each building upon the last, rather than when each session was devoted to a disconnected topic.

Findings about impact:

- ▲ The program had a powerful positive impact on many students' Jewish identity by stimulating changes in electives, in majors, in activities, and in projected careers.
- ▲ The program resulted in upgrading staff skills in doing outreach to non-Hillel students.
- ▲ The program raised Hillel's visibility on campus among students, faculty, and administrators.
- ▲ The program stimulated new partnerships between Hillel and campus organizations and between Hillel and campus administrators.

Case 6: Evaluating A Professional Development Program: The Teacher-Educator Institute of the Council for Initiatives in Jewish Education (CIJE)

The authors of this case are Adam Gamoran, Ellen Goldring, and Bill Robinson. They designed the evaluation described in the example.

Program description

As a catalyst for systemic change in Jewish education, *CIJE*'s mission includes the transformation of "the supplementary school into an institution where exciting learning takes place, where students are stimulated by what they encounter, and where a love of Jewish learning and the commitment to Jewish living is the hallmark of the institution." To accomplish this task, supplementary schools must become places where "exciting, innovative teaching by knowledgeable and committed educators" takes place. While research undertaken by *CIJE* has shown that Jewish educators are committed to a career in Jewish education, the research also has highlighted the substantial deficiencies of Jewish educators in formal Judaic training. One way to address these issues is to transform the types of professional development programs being offered to Jewish educators in their schools and communities from one-shot workshops focused on giving educators new techniques to more extensive and content-rich professional development opportunities that increase the capacity of Jewish educators to be reflective practitioners.

To develop this option the *Teacher-Educator Institute (TEI)* brings together teams of educational leaders from different communities and denominations to inquire, through reflective practice, into the nature of good Jewish teaching and good professional development. Teams are a central element of *TEI*'s change strategy - facilitating the development of local cohorts of educators who have shared an intense learning experience, developed a shared vocabulary and mode of educational discourse, and wrestled with conception of good teaching and learning and professional development. *TEI* models the type of professional development opportunities that the educational leaders may offer to the teachers in their particular schools and communities through such activities as:

- Investigations of videotaped lessons
- Curricular investigations
- Investigations into actual teachers' practices

Participants attend six seminars lasting about four days each over the course of two years. Between seminars, participants are asked to complete exercises, such as observation of teachers and design experiments. At the end of the two years, participants are expected to have developed:

- Improved understandings of teaching and learning, Jewish content, and professional development

- A personal repertoire of strategies for designing, implementing, and assessing professional development opportunities
- The ability to articulate a vision of good Jewish teaching, images of worthwhile professional development, and the relationship between the two

Program evaluation

The focus of the evaluation is to examine:

- Changes in the formal professional development programs offered to supplementary school educators in their community and schools
- Changes in the conceptions and practices of the *TEI* participants
- Changes in the culture of the schools in which *TEI* participants will be working

We determined that if *TEI* was to produce change it was most likely to be observable over time in these three areas.

While specific changes in the conceptions and practices of *TEI* participants may be observable after participation in the seminars, we are not expecting to observe substantial change in school cultures or community-wide professional development programs until a few years later. Thus, the evaluation began with interviews of participants prior to *TEI* and will continue for at least two years following their seminar participation.

Formal Professional Development Programs

To evaluate community wide changes in professional development programs an operationalized set of ideal characteristics of professional development programs was developed:

- *Content:* the program is designed to contribute to the Judaic content knowledge of the participating educators
- *Audience:* the program is designed for a specific group of educators
- *Sessions:* the program is a series of sessions designed to address a coherent theme
- *Groups:* the program requires educators to attend as school teams
- *Practice:* the program is designed to help educators reflect on and apply learning to their practice
- *Plan:* the program is part of a (comprehensive) plan, sustained over time, for the ongoing professional development of the educators Incentives: incentives are provided to encourage the participation of educators in the program
- *Incentives:* incentives are provided to encourage the participation of educators in the program
- *Evaluation:* the program contains a worthwhile evaluation process

A survey of the professional development programs offered by the central agency and supplementary schools was administered in five of the communities that sent teams to *TEI*. The data yielded a base-line map against which change can be measured when the survey is re-administered in a few years. In addition, the findings from this survey have been shared with the *TEI* faculty, who in turn have used the data in community presentations designed to mobilize the lay and professionals in the participating communities to change their current professional development offerings to be more in accordance with the articulated characteristics of good professional development.

Conceptions and Practices of the *TEI* Participants

To evaluate changes in the conceptions and practices of the participants, interview protocols were designed in consultation with the *TEI* faculty and an outside expert in professional development. The first interview protocol, administered to participants from the same five communities prior to their participation in *TEI*, focused on:

- Their past work as teacher-educators
- Their current relations with professional colleagues
- Their prior learning experiences
- Their images of good professional development

The findings provided both a base-line picture of the participants and insights into the nature of the environment in which they are expected to create change. A second (interim) interview protocol, administered during their participation in the *TEI* seminars, focused on the perceived significance of *TEI* to the participants and the influence it has had on their work with Jewish educators. In addition, it also probes for changes in their conceptions of good professional development and perception of their own educational needs. The findings from these interviews will help the *TEI* faculty understand the impact of *TEI* and reveal any unexpected aspects of participation. Timely reporting of base-line and interim findings will allow the faculty to adjust elements of the program to have a better chance of reaching the intended goals. In addition, the interim interviews allow the evaluation team to begin to understand the processes and conditions through which change will or will not occur in the participating communities and schools. Later interview protocols will be developed based on the findings from these initial interviews and the survey, as well as any changes in the program.

Culture of the Schools

To evaluate changes in the culture of schools and to continue monitoring changes in the practices of the *TEI* participants, case studies of the participants will be conducted following their completion of the *TEI* seminars. Given limited resources, we decided to conduct the case studies in only two of the participating communities. This combination of limited case studies and more widespread interviews and surveys was the result of a conscious decision to find an optimum balance between getting fairly easily obtained data from a large number of participants and procuring potentially richer data on actual changes in participants' practices and their effects that are more difficult to obtain from a small number of participants. The case studies will involve observation of actual teacher-educator opportunities designed and implemented by the *TEI* participants and interviews with participating teachers about the significance and influence of these opportunities on their learning and teaching.

General Comments

The *TEI* evaluation is currently a work-in-progress. It is important to understand that not only should the program designers be responsive to interim findings of an evaluation, but the evaluation designers should be responsive to their own findings in (re)designing future elements of the evaluation. Both are iterative approaches. Nevertheless, one must not lose track of the initial purposes of any evaluation; otherwise, at the end you may be left wondering as to whether or not the program actually "worked."

In the evaluation of *TEI* we have been and continue to be responsive to the results of our interim findings and to changes in the program itself; yet, we remain committed to evaluating the program against the goals of *TEI* that were articulated at the beginning. In designing and implementing evaluations of professional development programs, success often hinges upon maintaining the proper balance between formative and summative purposes, between the breadth and depth of data gathering activities, and between focusing on the initial goals of the program and ongoing changes in the program.

Case 7: Evaluating A Professional Development Program: MACHON L'MORIM: B'RESHIT (In the Beginning)

The authors of this case are Adam Gamoran, Ellen Goldring, and Bill Robinson. The evaluation was designed and conducted by Julie Tammivaara.

Program description

MACHON L'MORIM: B'RESHIT is a project of the Baltimore Jewish Community, funded by the *Children of Harvey and Lyn Meyerhoff Philanthropic Fund.* It is a professional development and school enhancement project designed to transform the nature of Jewish early childhood education in six pre-schools in Baltimore, including two JCC sites. In order to achieve its goal of developing a model of integrated Jewish early childhood education. *MACHON L'MORIM: B'RESHIT* had seven areas of focus: adult Jewish education for the pre-school teachers and directors; leadership development for the directors; pedagogic training for the teachers; parent and family education; community presentations; and school change processes.

To participate in the program, institutions were required to submit proposals that demonstrated their commitment to a Jewish early childhood program with developmentally appropriate practices, openness to change, a desire to engage in professional development, and a willingness to involve key stakeholders (i.e., lay leadership, rabbis, senior educators, parents, and faculty) over a three-year period of intensive study, planning, and action.

Evaluation design

The purpose of the evaluation was to describe and assess the impact of *MACHON L'MORIM: B'RESHIT* on the participating teachers and directors, the school environments in which they work, and the parents of their students. The evaluation employed four strategies:

- interviews with teachers and directors;
- observations of schools;
- assessments of Jewish knowledge of teachers and directors; and
- collection of relevant documents, including school communications to families, minutes of staff meetings, and reports from funding sources.

The documents were collected throughout the year; the interviews, observations, and assessments were conducted at the beginning, middle, and end of the school year. In addition to generating summative findings of the programs' impact on teachers and schools, the evaluation was designed to yield formative insights that could be used to improve the program during its initial two-year run.

Findings

After the first year of the program, the evaluation findings were primarily formative. Nevertheless, assessments of Jewish knowledge of both teachers and directors showed marked improvement in their understanding of holidays, life-cycle events, history, Bible, Israel, and prayer. In addition, the research illustrated that after one year changes were occurring already in the teachers' practices and in school programming.

The evaluation pointed to several factors that played a substantial role in engendering the observed changes:

▲ A demanding application process guaranteed that only the most interested and capable schools would apply, thus improving the prospects for success.

▲ Professional development programs often talk down to teachers, thus inhibiting their learning and willingness to change. Treating the *MACHON L'MORIM: B'RESHIT* participants as adult learners contributed to their ability to learn and change their practices. Four key elements of adult education were found to have occurred:

   1) establishing trust through connecting with learners where they were;

   2) challenging the learners with a test of their knowledge;

   3) offering consistent and abundant encouragement (in contrast to humiliating them for their lack of knowledge); and

   4) providing them with the materials to create their own visions of pre-school teaching and learning.

▲ A frequent hindrance to educational improvement is the inability of educational institutions to provide opportunities for teachers to communicate with one another. Having schools hold weekly meetings and creating the role of yoetzot (counselors), who met with the school teams to support their learning, helped to overcome this hindrance.

▲ Encouraging participants to connect their (enhanced) cognition of Judaism to their personal lives increased their confidence and willingness to teach about Judaism in their classrooms.

▲ By not emphasizing school change in the first year, there was sufficient time to gain participants' trust, develop their ability for self-assessment, and relieve their uneasiness with their own spirituality. Having these conditions in place facilitated the participants' readiness to think about school-wide change.

Case 8: Evaluating a Grants Program: The Jewish Identity and Continuity Grants Program of Bergen County and North Hudson

The author of this case is Leora Isaacs. She designed the evaluation described in the example.

General Comments

The 1990 National Jewish Population Study (NJPS) documented an overall decline in Jewish population, affiliation, involvement and practice among large segments of the North American Jewish community. These findings heightened concern about the current identity of Jewish individuals and the future of the Jewish community. In response, federations and their affiliated agencies across North America established commissions to support and develop programs and initiatives designed to strengthen Jewish identity and to ensure Jewish continuity. A number of communities launched competitive grants initiatives to provide funding to community agencies and institutions for innovative programming directed toward designated target populations (*e.g.*, families with young children, teens and youth, college students). A few communities built systematic evaluation processes into their grants from the onset; others began to formalize the assessment process farther along the way.

Program Description

The Jewish Identity and Continuity Grants Program was one of two mechanisms established by The Commission on Jewish Identity and Continuity of The UJA-Federation of Bergen County & North Hudson to build community and ensure Jewish continuity. During the program's first year $212,500 was awarded for 21 grants aimed at teens, college age youth, young adults and young families. Grant recipients were existing communal institutions, agencies and organizations.

Priority was placed on implementing programs as soon as possible. A reporting system was developed for monitoring grants.

Evaluation Purpose

At the end of the first year of operation, the Commission engaged Mandell L. Berman Jewish Heritage Center for Research and Evaluation at JESNA and the Florence G. Heller-JCC Association Research Center to evaluate the attainments of the first-year grants and to help revise the grants management and evaluation process for the future.

Collecting Data

The evaluators prepared their report based on review of the records documenting the history and progress of the Commission; a review of the original grant applications, implementation reports, supporting documentation and year-end reports for each project; discussions with project staff; and attendance at two meetings of the commission's sub-committee on evaluation. Findings were placed in the context of other identity and continuity initiatives being conducted across North America.

As part of the formative evaluation of the grants process, the Director of the Federation's grants initiative participated in a four-day seminar workshop on program evaluation conducted by one of the evaluators under the auspices of the Council of Jewish Federations through their Continuing Professional Education (CPE) program. As part of the seminar, the Director of the Grants Initiative analyzed the goals and implementation of the grants process and revised the continuity grants program's application, monitoring and evaluation procedures and instruments in consultation with fellow participants and faculty. A framework was created to guide applicants and then recipients through a process of clearly articulating objectives and measurable benchmarks at the outset of their projects, describing "inputs," providing ongoing, objective feedback on their progress ("outputs"), and documenting outcomes. Emphasis was placed on not only finding ways to document what was done, but also on assessing the impact of the programs on participants both in the short-term and creating baseline measures for longer-term assessment (if possible). Instruments and tools to guide the process were designed for use in the second round of grants.

Findings and Recommendations

Among the first year findings:

1) The Grants Initiative elicited strong communal involvement. Proposals were received from 24 institutions for 44 projects. The selection process resulted in awarding 21 grants.

2) The Commission's strategic decisions to implement the grant-supported programs in the shortest time possible and to work through and with existing organizations had both benefits and costs. It allowed new programs to be quickly established and clearly expressed the Federation's serious commitment to the Jewish continuity agenda, to its role as the community's central planning and coordinating body and to working with existing agencies, institutions and organizations in the community. The short time frame made it difficult (if not impossible) for grant recipients to plan adequately, to amass appropriate human and other resources, to devise appropriate evaluation strategies, etc.

3) The six focal areas identified by the Commission for its efforts were consistent with those emphasized by other North American Jewish communities.

4) The continuity objectives articulated by the Commission for each of the focal areas focused primarily on inputs, activities and outputs, and to a lesser degree on outcomes (the effects these programs would be expected to have on participants and institutions). This, in turn, influenced the emphases of the grantees.

5) The objectives of the grant recipients were consistent with the overall objectives of the Commission.

6) Most of the funded projects were analogous to those initiated in other communities, either through their continuity initiatives or as part of ongoing community activities.

7) It was not possible to evaluate the effectiveness of many of the individual projects because:

   a) indicators and benchmarks to be used in assessing achievement of objectives were not well defined;

b) without acceptable indicators/benchmarks it was difficult (if not impossible) to provide adequate instruments and measurements;

c) objective data were unavailable for most projects. In some cases inputs and processes were well described (i.e., the number of programs actually conducted and their attendance), but data for both baseline and outcome assessments were lacking.

These inadequaies were due to lack of experience with program evaluation (on the part of both the Federation and grantees) and inadequate time and resources to engage in the process.

8) Two key factors influencing institution's success in implementing the programs were institutional capacity (*i.e.*, qualified staff, volunteer support, collaborative relationship between partnering institutions, access to target population) and valid assessment of the need/responsiveness of the target population for the program. There was great variation in the numbers of participants engaged by programs.

Based on the findings, it was recommended that:

1) The Commission should review and revise their Continuity Objectives to more clearly articulate preferred outcomes. Grant proposals should be evaluated relative to their potential to bring participants and institutions closer to those outcomes.

2) The revised monitoring and evaluation process should be implemented to provide the UJA-Federation with the information needed for decision-making and the institutions with the information needed to maximize the potential for success.

3) UJA-Federation should provide additional direction and professional development and training to assist grant applicants and recipients in articulating measurable objectives, designing appropriate evaluation methodologies, documenting their activities and in assessing effectiveness at the outset of the grant development process. Additional human and financial resources for supervising the grants initiative must be provided.

4) To optimize success, the Commission should carefully assess the institutional capacities of grant recipients. No matter how great the merit of a project, the lead institution must demonstrate appropriate levels of expertise, staffing and institutional organization to sustain it. Where collaborating partners are involved, the Commission should also have assurance that the partners will cooperate and that the necessary resources are available.

5) Similarly, the Commission should require evidence of the need and/or readiness of potential participants for proposed programs.

6) Consideration should be given to offering renewable (multi-year) grants, especially for projects likely to require more than one year to become established. Renewal should be contingent on achieving articulated "benchmarks" for each period of the grant.

Evaluating Jewish Programs: Issues

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Evaluating Jewish Programs: Issues

Informal Evaluation: Evaluating One's Own Work

The perspective taken in this *Guide* is that informal evaluation is very important for Jewish professionals and lay leaders and should be encouraged and valued by every Jewish institution. At this time of rapid change and experimentation, it is essential for everyone to cultivate habits of reflection and self-evaluation both for maintaining their sense of balance and for stimulating their growth. Doing this is difficult in synagogues, schools, and agencies, where there is more work to be done than can be done and where the press is towards getting on to the next task almost before the last is completed.

If you are a program provider, informally evaluating your own work can take many different forms.

1. **Intentional reflection on your own performance.** Techniques that you might use for doing this include *journal keeping* so that you make for yourself a chronological flow of facts and feelings that you can review at periodic intervals; writing down on post-its, index cards or on computer of *critical incidents* to capture particularly important events or conversations; scheduling *periodic time-outs* where you mentally assess how you feel about where things are, where they should be going, and what you should do next. Cultivating habits of reflection helps you to become a very acute observer of your own thoughts, feelings and actions.
2. **Intentional solicitation of feedback starting with sympathetic friends, colleagues and others.** This may feel difficult to do especially if you anticipate criticism that you are reluctant to hear. If you start with people you trust and open the conversation with comments such as "*Tell me how I did, from your perspective. What might I have done differently? What would you have done in my position?*" you are likely to get feedback in a form that you do not have to defend against. As you get practice, you can then move on, little by little, to soliciting the same kind of feedback from less friendly individuals. But do stay away from those people you regard as toxic until you know you can handle their responses without damaging your mental health.
3. **Intentional solicitation of feedback from program participants.** It is very helpful to purposefully change the role of participants in a program from passive audience to engaged partner. Most people need encouragement to take active responsibility for their own learning and to critique both the content and the form of what is presented to them. By taking time out during programs or at the end to ask people, "*How is this going for you? Are you stimulated/engaged by what you are learning? What would work even better for you?*" you help them to do their own "meta-learning" — learning about their own learning — and in the process of doing this, they give you insights into improving the program.

Informal Evaluation: Helping Others Evaluate Their Own Work

If you are responsible for the work of others who do programming or services, there are at least four ways in which you can interact with them to encourage them to informally evaluate their own work, and provide them with evaluative guidance: through supervision, mentoring, coaching, and team leadership.

Supervision works best when there are one-on-one regularly supervised uninterrupted appointments. Supervision meetings should always have a mutually agreed upon agenda. The supervisor should be encouraging the supervisee to evaluate his or her own work, as outlined about, as well as providing feedback, guidance, suggestions and direction.

Mentoring is different than supervision. Mentoring occurs when you choose someone you admire and trust to provide you with guidance. This relationship is less formal and more comprehensive than that with a supervisor. Mentors usually guide mentees by discussing personal and interpersonal as well as task-related issues. In addition, a mentor models what a mentee would like to become. Conversations between mentor and mentee encourage on both sides the awareness and reflection that is part of self-evaluation. Sometimes mentor-mentee relationships, instead of forming spontaneously between two people, are arranged for by others, for example, when someone designates a relationship between senior and student rabbis, between college students and community leaders, or between school administrators and student interns.

Coaching is yet another kind of relationship where an expert guides a novice through critique, demonstration, and support. This enables the novice to fine-tune skills and develop the confidence to carry out complex tasks. Coaching can be part of informal program evaluation with the coach providing perspective and wisdom for program improvement.

Team Leadership. Programs in Jewish settings are mounted rarely by someone working completely alone. They are usually team efforts. Post-program debriefings produce useful insights. To debrief effectively, good communication skills are critical. People must be capable of both giving and receiving constructive criticism. They must become astute analysts of one another's work, while supportive of one another's efforts and charitable about one another's short-comings.

Formal Evaluation: Requiring Others to Evaluate Their Own Work

Increasingly, Jewish funders are asking grantees to evaluate their own work. Increasingly, boards and policy makers are asking program providers to evaluate their own work. It is time to be careful and thoughtful about what kinds of evaluation to mandate.

We know from the history of public educational reform efforts that formal evaluations, prematurely imposed by Federal or state funding agencies, killed promising new programs. We know that mandated evaluations, some with very detailed specifications, were burdensome for local sites and, even worse, distorted the way in which local programs could respond to local needs. The government's investment in program evaluation did not always pay off in getting better education. Evaluations that yielded answers different from what powerful interests wanted were often ignored. Decisions about program continuation, for example, were sometimes influenced more by political considerations than by effectiveness considerations.

So, what can be inferred from these general education experiences that is pertinent for evaluation in Jewish settings? First, avoid premature evaluations. Second, negotiate with program providers about evaluation purposes and questions. Third, acknowledge and deal with the political as well as the technical aspects of program evaluation.

As a policy maker who endorses a program, or as a funder who supports a program, you might weigh the following considerations in deciding the kind of formal program evaluation to mandate.

Program readiness. When programs are in the early stages of conceptualization and execution, you might ask the program providers to plan and carry out informal self-evaluation and provide them with the technical assistance and resources they need to do this. If you think it is desirable to have a formal evaluation at this stage, using an outside evaluator, it is likely that mandating a formative evaluation emphasizing implementation concerns, with frequent feedback and discussion will be very helpful.

When programs are mature and stabilized, formal summative evaluations of impact are useful and provide the information needed to make refunding decisions.

Evaluation negotiation. Policy makers and funders should participate in framing the evaluation questions and acknowledg the politics at work. These individuals should also ensure that there are sufficient resources to do high quality evaluations.

Building the evaluation infrastructure. As formal evaluations become more common as attachments to programming in the Jewish community, funders, policy makers, evaluators and program providers might want to consider building better theoretical, conceptual and political frameworks for evaluation. They might consider adding training in evaluation to existing pre- and in-service educator courses, orienting experts with evaluation skills in the unique issues of evaluation in Jewish settings, and creating various networks to share evaluation techniques and findings.

Formal Evaluation: Working with an Outside Evaluator

Sometimes, an entire evaluation is contracted to an outside evaluator who is given discretion to handle the evaluation in any way he or she sees fit. This rarely works well.

More helpful is when an outside evaluator works with an insider or with an evaluation committee to focus, frame, and carry out the evaluation.

Sometimes, an outside person will do only specified portions of the evaluation — for example, the design or analysis of a questionnaire, the conduct of a series of focus groups, or follow-up telephone interviews with program participants several months after the end of the program leaving the rest to insiders.

Finding the right outside person to do the program evaluation may be a major challenge. Evaluators come in many shapes and sizes and have preferred ways of working. Some are interested in implementation evaluation; others are interested in impact. Some prefer goal-based evaluations; others want to do goal-free evaluations. Some are skilled in quantitative techniques, others like to work with qualitative data. Some see their responsibility as ending with the generation of findings; others believe they should make recommendations based on what they have discovered.

During the interview and reference-checking process, candidates talents and preferences should be thoroughly explored. Whoever is charged with recruiting and selecting the evaluator should bear in mind the purposes for the evaluation and aim to find an evaluator whose orientation is compatible with those purposes. Proposals may be solicited from several evaluators, so the selection committee will have comparative costs and alternative evaluation designs from which to choose.

In the Jewish community, many people doing program evaluation have had and will have other relationships with program providers and funders. **Role conflict or role ambiguity may complicate the program evaluation, and this possibility should be explored before selecting an evaluator.**

Once the evaluator is on board, ways of working together should be negotiated. An evaluation committee may be formed to work with the evaluator, or the program director and the evaluator might work together on the evaluation. Sometimes a board member might be the contact person for the evaluator. **It is important to be clear in advance about who the evaluator "works with" and who the evaluator "works**

for." Many evaluations become confused or enmeshed in the politics of the institution unless care is taken to do this.

The reporting process should be clarified early on. If the evaluation is primarily formative, the evaluator usually will provide reports orally to those involved in program delivery before informing others. Even if the evaluation is primarily summative, the evaluator might present preliminary findings to those most closely involved in the program to find out if there are any gaps that should be filled before reporting to boards or outside funders. **Drafts of the written report should be discussed with many stakeholders before being finalized.**

Formal Evaluation: Minimizing Evaluation Risks, Maximizing Rewards

As we have indicated throughout this *Guide*, evaluations are not only conceptual and technical exercises but also political and social activities that have costs and benefits as well as risks and rewards for institutions and groups. We have argued that at this point in time in Jewish settings the benefits of evaluation will outweigh the costs and the rewards will outweigh the risks. However, this will happen more frequently in those circumstances when people not only recognize the risks and intentionally set out to minimize them, but also welcome the rewards and intentionally set out to maximize them.

What are some program evaluation risks and how might they be minimized?

Risk 1: Evaluations may become embroiled in, and exacerbate, institutional politics.

From time to time, program evaluations can leave institutions worse rather than better off. To guard against this happening, from its inception the evaluation must be genuinely well-intentioned. It should focus on learning rather than on finding fault. If it is not possible to do a well-intentioned evaluation under the existing circumstances, it should not be done. Other forms of inquiry, problem solving, or conflict resolution should be found to solve such institutional issues. Assuming that stakeholders can be assured that a program evaluation is well- intentioned, everyone must become aware of the anxieties and resistance that they themselves are experiencing and how they are defending against them. Everyone also must be sensitive to other people's anxieties and try to assuage them. Sometimes, anxieties and resistances can be laid to rest simply by discussing everyone's fears and "worst nightmares." Sometimes, creative negotiation is needed to develop specific safeguards at sensitive points in the evaluation process. And sometimes, it must be accepted that not all evaluations run a smooth course, especially if there is a great deal at stake. People with differing interests may have major disagreements about how to frame the questions, collect the data, analyze the data, or publish results. These disagreements should be worked through in as facilitative a manner as possible. In these situations, power is better regarded as "power to", "power with", or "power for", rather than as "power over".

Risk 2: Evaluations may be seen as having negative consequences for individuals.

Evaluators and evaluation committees should regard program evaluation as distinct and separate from personnel evaluation. Program evaluations may sometimes touch on personnel issues if it appears that programs are insufficiently staffed or if there is a mismatch between program requirements and job responsibilities or performance. However, personnel decisions should be always insulated from the program evaluation process and handled in separate deliberations that will consider all relevant factors and options.

Risk 3: Evaluations may surface issues that have been intentionally buried.

People's forebodings about program evaluations are that they will bring bad news rather than good news. However, when appropriately conceptualized, evaluations should surface what works well. They should provide visibility and recognition for accomplishments, as well as spotlighting what needs improvement. The evaluator and the evaluation committee need to remind themselves of this, so that they remain vigilant about nurturing and rewarding the positive. As for issues that have been intentionally buried, they are probably not very well-hidden, only ignored or denied. Bringing them to light and resolving them in an orderly, structured process should make for a healthier institution in the long run.

Risk 4: Evaluations may prematurely kill off promising program ideas.

Premature formal evaluations can indeed bludgeon a newly-formed program to death, and care should be taken by funders and policy-makers not to have this happen. Encouraging non-formal reflection and informal collegial evaluation should be considered when promising practices look like they have not yet reached the stage where they are making an impact, but they have the potential to do so. As much as possible, program evaluators, like doctors, should customize what they do, so that they will "do no harm."

What are the rewards of program evaluation and how might they be maximized?

The rewards of program evaluation are reaped not only by particular programs within a particular Jewish setting but also by those in other settings who can learn, at low cost, from the experiences of others. The Jewish community rewards from program evaluation include the following.

Reward 1: More outstanding programs.

Programs improve with attention. Program evaluation provides such attention and can move programs from fledgling to mature, from mediocre to sophisticated, from poorly managed to well managed, and from low impact to high impact.

Reward 2: More skilled programming.

Going through the process of an informal or a formal program evaluation is educative for everyone concerned. The skills and "habits of mind" acquired during one program evaluation are likely to ripple through and benefit the development of subsequent programs by heightening everyone's awareness about how to frame questions and find answers.

Reward 3: More sophisticated understanding of desirable and realistic program outcomes.

Funders, policy makers, and program providers often have unrealistic expectations of what single, small programs can do. Program evaluation, by stimulating the discussion of realistic and probable outcomes, can encourage the development of linkages among programs so that multiple and cumulative experiences will result in long-term and important effects.

Reward 4: More frequent communication among program stakeholders.

This reward may be ancillary to the primary purpose of a program evaluation, but it is a frequently observed reward. Program evaluations are useful vehicles for organizing cross-conversations among people who may interact only infrequently in the course of their usual routines. Creativity and new ideas are generated when people with different perspectives come together to do a common task.

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December 1997

Single Copy $15.00