

MEMORANDUM

To: Steven Kraus, Executive Director, The Alliance for Continuing Rabbinic Education (ACRE)

From: The Rosov Consulting Team

Re: Assessing Success: A Consultation on Developing Strategic Indicators of Impact for ACRE – Final Deliverable

Date: June 27, 2013

In May of 2013 the professional leadership of ACRE invited Rosov Consulting to design and facilitate a half-day convening focused on demonstrating the impact of continuing rabbinic education beyond the rabbis who are direct beneficiaries of such programs. Through this consultation process ACRE sought to understand attitudes and practices around evaluation in its member organizations, test whether there was consensus around the need for and utility of a set of metrics that would demonstrate impact on more distal “end users,” as well as to begin to chart a path toward developing such a set of measurements.

There are at least three reasons to develop metrics and instruments that assess impact beyond rabbis. The first is for the knowledge of the CRE providers themselves—to help them design and refine their programs. The second is to develop “good practices” for the field of CRE in program design and evaluation. And the third is the conviction on the part of some of ACRE’s key stakeholders and supporters that if the positive impact that CRE providers have on end users (those served by the rabbis in CRE programs) can be shown, these data can be strong advocacy tools for securing additional funds for CRE providers. As one provider of CRE put it, “I want to believe that the folks that our rabbis serve are enriched as the result of the rabbis getting high quality education, but I don’t have much usable data.”

In preparation for the convening Rosov Consulting used three main sources of data: review of key documents associated with ACRE and member organizations; interviews with providers and funders of continuing rabbinic education; preliminary exploration into how the question of continuing education and impact on end users has been addressed in other fields. This memo summarizes issues that surfaced during our pre-convening interviews and review of program documents, the key components of our discussions during the June convening, and provides a set of recommendations for moving forward.

ISSUES FOR CONSIDERATION IN ASSESSING IMPACT

In both the interviews conducted by Rosov Consulting, as well as in the conversation that took place during the convening, a number of themes emerged that pointed both to the diversity of ACRE member organizations as well as varied approaches towards demonstrating impact beyond rabbis.

Different Organizational Models

ACRE member organizations represent a wide spectrum of American Jewish life. The interviews also revealed diversity in terms of organizational models. ACRE members include three major types of organizations working with North American rabbis: those organizations that were seminary-based; those that were affiliated with a professional rabbinical association and denomination; and those that were stand-alone organizations.

Generally leadership of organizations that had an association with a particular seminary or denomination struggled more to articulate goals for impact beyond rabbis. These organizations often operated primarily as alumni or professional networks, with little professional interaction with other end users. In the case of the few stand-alone organizations we spoke with, impact beyond rabbis was often an integral part of the organization's mission statement. Though these organizations struggled to understand and develop metrics around how working with rabbis impacted the larger Jewish community, they had generally (though not exclusively) done more thinking in this area.

Diverse Goals and Visions of the "End User"

ACRE member organizations had a vast array of ultimate goals for their programs, as well as indicators for success. The organizations often had very specific niches within which they operated with. Broadly speaking there were goals related to: bolstering the rabbi as an authority figure in community, developing the rabbi as organizational manager, and inspiring the rabbi as lighter of souls. For an ACRE member organization, success might be a congregation that respects their rabbi, an organization that makes financial decisions in alignment with their values, or a recharged rabbi who offers other spiritual growth. End users might be all of humanity, the North American Jewish community writ large, an organizational board, or a congregation. This diversity raises the question of how to develop a shared bank of metrics that would reflect the different desired outcomes promoted by ACRE affiliated organizations.

Learning How to Ask

There was not unanimity around the need for measurement of impact beyond rabbis. In some cases it seemed the interview was the first time the leadership had been asked to or given an opportunity to consider the possible impacts beyond rabbis. While no organization had "solved" the problem there were many at different stages of asking the question or in understanding the question as one worth asking.

Multiple Purposes of Continuing Rabbinic Education

The interviews revealed differing notions regarding the primary purpose of continuing rabbinic education: is it a form of *professional*, *personal*, or *spiritual* development? How do these different understandings of the purpose of continuing rabbinic education support and/or challenge one another?

A major theme heard across interviews was the belief that rabbis are, as a professional group, in great danger of “burnout.” This belief, that defending against burnout is central, shapes the purpose and practice of continuing rabbinic education. One provider of CRE explained, “We found the rabbis that came (to our programs) were so depleted, so burned out, so drained by the experience of being a rabbi, that the emphasis sort of shifted to ‘you need to self-care’, there wasn’t even expressed expectation (of what they would do in their home communities).”

It is important to note that the trope of the depleted, exhausted rabbi echoes images of the clergy in other American denominations. Historically, the notion of the necessity of clergy “support” and concern for the “dispirited” clergy appears frequently as a central rationale for clergy continuing education (see for example Wind and Rendle, 2001), alongside with other goals such as attainment of new knowledge, keeping up to date on cultural changes, etc. (Hoge and Wenger, 2005). Those who argued in favor of the need for continuing education of clergy often depicted clergy as a psychologically vulnerable population because of the challenges of the work and the centrality of maintaining a sense of “calling” (Houle, 1980, p. 109, as cited by Martin, 2007, p. 44).

While concerns about burnout exist in other fields, it is rarely addressed with the alarm this subject generates in clergy continuing education. This hints at some of the ways in which rabbis are different from many other kinds of professionals. The relative importance of spiritual recharge in the larger field of clergy education raises the question of whether clergy support and/or recharge ultimately impacts congregants or other constituencies. Perhaps the purpose of clergy recharge is, for example, more important as a means to stem defection from the field.

Supporting Rabbis: A Prominent Focus

Almost all the people directing and evaluating continuing rabbinic education programs are rabbis. Thus the leadership of these organizations possess deep insight into the concerns of rabbis and the challenges of their work. Many providers of CRE see their primary role as an advocate of the rabbi, or on the rabbi’s side. Thinking about the beneficiaries/impacts beyond rabbis may, in some cases, require a cultural and/or organizational shift. As one interviewee explained, “My primary responsibility is to the rabbis.”

While assessing impact beyond the rabbis is a desirable goal for many CRE programs, it is important to consider that this may not be the ultimate goal and/or the only goal for all CRE programs. Some CRE programs may indeed have a primary purpose of supporting rabbis. In such a case, it would be counterproductive to insist on metrics that measure impact on other end users.

ABSENCE OF A “THEORY OF IMPACT”

Many professional fields have developed a theory of impact, which offers fruitful avenues for assessment. A theory of impact lays out the implications for the end user through investment in professional education, whether between doctor and patient, lawyer and client, or clergyperson and congregant. Absence of a theory of impact makes it difficult to move towards measurement.

Both in the interviews and the convening in New York no one was able to offer a theory that accounted for how continuing rabbinic education had an impact beyond rabbis. Some interviewees suggested if the rabbi is nourished than he/she would be able to engage their community in more meaningful ways. However it was not clear how, or if, one necessarily led to the other. Some people interviewed asserted that in helping and advocating for rabbis there would be a kind of “trickle down” to the community, even if they couldn’t point to how. One provider of CRE explained, “My (job) is helping rabbis. How exactly that translates into a particular seat, in a particular pew, in a particular synagogue is the motivating factor but it’s not my focus... I am committed to supporting the rabbis with confidence that with a stronger rabbinate there will be a stronger community.” Others expressed doubt that continuing rabbinic education that focused on the rabbis’ sense of personal renewal had any important impact on the community. Still others wondered about the relationship between CRE and community impact, but were not clear how to test or measure that assumption. One provider of CRE explained, “I’m having trouble with this, I don’t know how to measure if recharging makes them better clergy.”

Continuing education is often focused on the professional participating in the educational program; making the leap to assessing impact on other end users can be a challenge. This fundamental difficulty is further compounded by the complexity unique to clergy work including: oftentimes limited and sporadic contact with end users, the diversity of rabbinic work and characterizations of success in different settings, and other variables that may obscure the impact of the rabbis’ professional development in her/his place of work. Articulating and testing theories of how continuing rabbinic education impacts end users is a key component in moving towards metrics to assess impact.

CONTINUING RABBINIC EDUCATION: A CASE OF WHAT?

Which professions are rabbis most like in terms of their approaches to and needs from continuing professional education? While rabbis are considered professionals, there are some obvious limits when comparing rabbinic continuing education and continuing education in other professions.

With perhaps the exception of clergy, most professions are evidence-based. That is, most professionals are embedded in fields that have existent metrics. Continuing professional education can be shown to either support or thwart those end goals. Generally, however, providers of continuing professional education are not called upon to invent the metrics for their field, so much as to demonstrate whether their programs lead to the desired outcomes, which are already delimited. The absence of clear metrics for the larger field of professional

rabbinic work makes the efforts of ACRE to develop their own measures for continuing education far more ambitious and challenging.

There are further points of disjuncture between CRE and continuing education in other fields; for example, most professional fields require continuing education to maintain licensure. Additionally, in many fields continuing education programs must be with an accredited provider. In CRE, rabbis generally choose their own programs and providers. Some interview participants questioned the existing model, wondering whether the rabbi should be authorized to make these decisions, others expressed concern that congregations would begin to dictate what courses rabbis could or could not take.

Several interviewees and discussion participants drew analogies between the continuing professional educational practices of rabbis and other professions, particularly doctors and lawyers. While doctors and lawyers may have been the most commonly cited analogy (and also perhaps two of the most highly esteemed professions) it is important to consider the limitations of these fields as analogs. Other possible professional analogs might include, for example, teachers or social workers. Investigation into the metrics used in continuing professional education in these less frequently cited fields may be fruitful.

Approaches to Assessing the Impact of Continuing Professional Education in Other Fields

Many fields have a multi-tiered approach to assessing the impact of continuing professional education on the end-user. In health related fields (nurses, doctors, physical therapists etc.) evaluation of patient outcomes are standard. Evaluation of continuing education in such fields includes:

1. Self-report of knowledge
2. Self-report of change of practice
3. Patient outcomes. Metrics include: time spent in hospital, amount of pain reported by patient, etc.

It's important to note that, in health-related fields, increased professional knowledge is not seen as a sufficient indicator of success, there must be a change in clinical practice which leads to improved patient outcomes. Social workers may be more like rabbis in the diversity of the kinds of workplaces they may find themselves in: from managing a non-profit organizations, to providing one on one counseling services. In continuing social work education there are three levels of evaluation:

Level 1: Whether theory and skills are learned

Level 2: Whether social workers are able to practice these new skills at end of program

Level 3: Whether social workers are able to practice these skills in the workplace

Most continuing social work education programs meet at least the Level 1 requirement in the form of some kind of pre-post evaluation. Many continuing education programs achieve Level 2 in the form of role playing. Very few programs achieve the Level 3 evaluation because of the investment required to follow up with agencies and other places of work. Still the field would like to move towards this level of evaluation for its programs.

This tiered approach to assessment of end user impact may be useful as a model for continuing rabbinic education.

CHALLENGES AND POSSIBLE AVENUES FORWARD

In the interviews and discussion, participants articulated a number of challenges to assessing the impact of CRE on end users. These include: the diversity of rabbinic work and what constitutes success in different contexts; whether most end users have a close enough vantage point to assess change in rabbis with whom they infrequently interact; the possible divergence between the goals and interests of lay people and their rabbis. Additionally, some raised the concern that measures may be developed that would not adequately assess core outcomes, so much as peripheral outcomes more easily measured.

Even given the aforementioned challenges, there are a number of opportunities for moving towards the goal of end user measurement. ACRE is well positioned to advocate for and support this work among its member organizations.

The following are recommendations for next steps and areas for further inquiry:

1. Beginning To Ask

ACRE member organizations exist on a continuum in terms of their interest in and capacity for assessing end user outcomes. Many organizations affiliated with ACRE do not currently place any emphasis on outcomes beyond rabbis when planning and developing programs. Even though there is a continuum of practice and uncertainty and ambivalence around end user measurement, there are a few concrete steps to begin with.

Beginning to consider possible desired outcomes for a broader constituency is an important first step in terms of being able to eventually assess impact. Some ACRE affiliated organizations that do not currently evaluate their programs may want to consider implementing approaches used in other fields as a gateway toward ultimately assessing more distal end user outcomes. While ACRE may not currently be in a position to offer a bank of possible survey items and other approaches to evaluation and measurement, ACRE can provide their constituent organizations with an introductory document that outlines different approaches to evaluating outcomes, and suggestions for implementation. Given the diversity of CRE providers and the various communities which they serve it is likely that one size will not fit all. Moving forward it will be critical to consider diversity among organizational models and desired outcomes among ACRE member groups.

2. *Mapping the Field*

At the most basic level, no comprehensive map for the field of CRE currently exists. Presently there does not appear to be a clear sense of the existing programs, participants, and resources available for CRE. Understanding the state of the field may reveal important trends and/or patterns.

Such a mapping process, were it undertaken, would include:

- What monies are currently invested in CRE?
- What are the participation rates for CRE writ broadly and for various subgroups within the North American rabbinic population?
- What are the variety of market segments for CRE? Are all of these groups currently reached by existing CRE programs?
- What proportion of current CRE programs are targeted at different stages in their rabbinic careers?

We recommend that ACRE undertake such a mapping to understand more deeply the breadth the depth and scope of the field, if they can think deeply at supporting encouraging more systematic effort around evaluation and measurement.

3. *Investigating Approaches to Continuing Clergy Education (CCE)*

There is a need for further research which looks at clergy beyond the Jewish world and their own approaches towards the enterprise of CCE writ broadly. Additionally, it may be beneficial to open up a conversation with other foundations and organizations engaged in similar efforts. Organizations such as the Lilly Endowment, the Carnegie Foundation, and The John Templeton Foundation may be excellent resources.

4. *Surfacing and Articulating End-User Outcomes from Other Points of View*

Many discussion participants noted how little formal knowledge there was around different stakeholder expectations and experiences of CRE. We recommend undertaking qualitative inquiry with a variety of stakeholders. Next steps might, for example, include focus groups with rabbis, lay leaders, “Jew in the pew” and other constituencies to understand, from their perspectives, what could constitute end-year outcomes.

CONCLUDING THOUGHTS:

While there is some ambivalence and concern about evaluation among some members of the ACRE community with whom we spoke, there is evidence of both genuine interest in and appetite for this work. As suggested above, there are a number of concrete steps that could be taken to move forward this important agenda. Our team would be more than pleased to help ACRE prioritize and take its first steps on the road to both supporting member organizations in their own evaluation work as well as assessing more field-wide outcomes of CRE.

APPENDIX A

Interview Participants and Meeting Attendees:

Rabbi Lisa Goldstein, *Executive Director, Institute for Jewish Spirituality*

Rabbi Alan Henkin, *Director of Rabbinic Placement, Central Conference of American Rabbis*

Dr. Maury Hoberman, *Trustee, Lasko Family Foundation*

Rabbi Steven Kraus, *Executive Director, Alliance for Continuing Rabbinic Education (ACRE)*

Rabbi Michael Marmor, *Vice-President of Academic Affairs, Hebrew Union College*

Rabbi Levi Mostofsky, *Director, Department of Continuing Education, Center for the Jewish Future, Yeshiva University*

Rabbi Deborah Prinz, *Director of Program and Member Services and Director of the Joint Commission on Rabbinic Mentoring, Central Conference of American Rabbis*

Dr. Ora Horn Prouser, *Executive Vice President and Academic Dean, The Academy for Jewish Religion*

Rabbi Rebecca Sirbu, *Director, Rabbinic Cabinet, Rabbis Without Borders*

Rabbi Jerry Weider, *Director, Rabbinic Council, Jewish Federations of North America*

Ms. Lisa Zbar, *Development Director, Institute for Jewish Spirituality*

APPENDIX B

INTERVIEW PROTOCOL FOR ACRE MEMBERS

Thank you for taking the time to speak with me today. As you may know Rosov Consulting is working with ACRE in an effort to develop a set of recommendations that will help providers of continuing rabbinic education demonstrate, in an evidence-based way, the impact of their programming beyond the rabbis they work with.

We have had a chance to review the program documents and basic information that you have shared with us. We now want to deepen our understanding of your program's work in continuing rabbinic education and so we have just a few questions we want to cover during this time.

1. What are you attempting to accomplish through your work in continuing rabbinic education?
 - a. What are you trying to do?
 - b. Who/what are you trying to impact?
 - a. Who do you keep in mind when designing your programs?
 - b. What outcomes are you ultimately seeking to promote?
 - c. Who do you understand to be the ultimate beneficiary of your work?
 - d. Does your organization consciously seek to have an impact beyond the rabbis who participate in your programs? If so, on whom? If so, *how* does your program's impact reach beyond immediate rabbinic participants?
2. What constitutes success for your work in continuing rabbinic education in terms of impact beyond the rabbis you work with? How will you know if you have succeeded?
 - a. What might you observe or experience that would suggest you are meeting your goals?
 - b. Where would one look for evidence of success? Who would one speak to?
 - c. At what point do you think those indicators of success would be apparent (immediately, a year, etc.).
3. What have been your organization's greatest achievements so far with regard to your work in having an impact beyond the rabbis you work with?
4. What have been some of the greatest challenges to having an impact beyond the rabbis you work with?
5. What sources of revenue/support do you currently have? PLEASE BE AS SPECIFIC AS POSSIBLE. Do funders make this request? What is the total amount of dollars devoted to CRE in your organization each year?

6. Is there anything I didn't ask that you think I should have that would help us prepare our recommendations for how providers of continuing rabbinic education can best demonstrate (in an evidence-based way) the value of their work?

INTERVIEW PROTOCOL FOR ACRE FUNDERS

1. How long have you been involved with funding ACRE as an association of continuing rabbinic education providers and/or with funding specific providers of continuing rabbinic education?
2. What was it in particular that drew you to an involvement with ACRE and/or these specific providers?
3. What do you see as the distinctive goals that continuing rabbinic education providers are trying to achieve?
 - a. What are continuing rabbinic education programs trying to do?
 - b. Who/what are they trying to impact?
 - c. Who do you see as the ultimate beneficiary of their work?
 - d. How do you see continuing rabbinic education having an impact beyond the rabbis who participate?
4. What will constitute success? What, for you, would provide compelling evidence of success?
 - a. What are the kinds of indicators that you are looking for, so as to know that these goals are being reached?
5. Is there anything I didn't ask that you think I should have that would help us prepare our recommendations for how providers of continuing rabbinic education can best demonstrate (in an evidence-based way) the value of their work?