Using Research For Jewish Community Planning

Cohen Center for Modern Jewish Studies
Brandeis University
Gary A. Tobin, Director

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Introduction: Why Community Research?

The use of research in Jewish community planning has been growing dramatically over the past several years. Federations, Jewish community centers, and national organizations, as well as a vast array of agencies and synagogues and temples in the Jewish community have turned to research to help plan for a variety of changes. As the communal investment in research grows, it is essential to assess what we know about successfully undertaking and completing research in the Jewish communal world.

Research is initiated for a number of reasons. One of the most basic, of course, is the need for information in making major policy decisions. Basic demographic information, attitudinal and behavioral data, are crucial; without them, decisions are made in information vacuums, often resulting in the misdirection of large capital or program expenditures. Accurate information can help guide good policy making in any organization or institution.

Data are also crucial for meaningful and focused discussions. In the absence of widely disseminated and accurate information, the ability to make policy decisions is severely limited. Many planning discussions revolve endlessly around speculation on questions such as where people live, how many children they have, what the age distribution is, and so on. Because the basic facts are missing, discussions become circular as participants vainly attempt to explore issues. Re-examination and redirection are stymied without information. A common knowledge base gained through research provides a framework within which focused and productive discussions can take place. Discussions can shift to what should be done, rather than floundering on the validity of particular demographic or behavioral
patterns as perceived by participants.

Research can serve as a catalyst for planning. The process of collecting and disseminating community information itself can produce excitement and a fresh willingness to approach difficult issues. The investment in research sometimes creates an imperative to act. Moreover, communities or agencies which commit themselves to gathering data also have an inherent commitment to making use of it. In this way, the research process can take on a life of its own, spurring and encouraging action.

Research can legitimize particular actions or policy decisions, whether the findings confirm impressionistic evidence or whether they supply surprising new insights. Data can provide either substance, a rationale, or a framework for ongoing committee, management, or political decision-making activities. Even when research findings confirm or quantify the expectations of lay leaders or professionals in the field, they provide a crucial framework for action. "Scientific" findings as opposed to second-guessing or, in some cases, wild guessing can provide the necessary confidence to move ahead on decisions both large and small.

Sometimes, "surprises" do emerge from research. New findings may direct people's thinking in ways and areas that had not been central or acceptable before the research began. In such cases, research can be a springboard for a departure from the status quo.

Planners may see the need for further inquiry in areas that were untouched by the original research, or more in-depth areas of inquiry that were only marginally addressed. The completion of one research project often leads to the need for additional information. Any particular research effort cannot possibly address the complete range of planning and policy questions in an organization, much less those of an entire community. Therefore, any individual study effort should be viewed as part of an ongoing research process.

Using Jewish Community Surveys

Jewish community research studies undertaken by local Jewish communities of their Jewish populations, can be used in three primary areas. First, such studies can be used to assist in campaign and other fundraising planning. Attitudinal and behavioral data can be collected about why people give, to what philanthropies they give, and possible motivators. The studies are a basic market research effort, not unlike other market research that is completed in the private sector.

Second, the data can be used to help plan human and social services. Where day care should be located, the number of children needing day care, the need for housing for the elderly, and a wide variety of service issues can be explored through this research. Institutional location issues, where to move a facility or locate a particular service fall into this category.

Third, research can help in community development and building. Issues relating to expanding the scope of Jewish education, outreach to the unaffiliated, and synagogue and temple planning, can be furthered through the implementation of community research. While other uses of research can be identified, campaign planning, service delivery planning, and community development programming are the primary functions that are served through large-scale community research.

Studies, no matter how useful, are certainly no panacea. Often, it is expected that research can solve problems that really
require different approaches or are outside the arena of the actual completion of the research. Doing research does not solve problems; it can only provide a framework within which certain kinds of issues can be addressed. Expectations are often unrealistic about what research can do and the role it should play in organizational, institutional, and communal structures. Therefore, community leaders and planners must stress realism about what research can and cannot do.

The Limits of Survey Research

The limits of large-scale survey research fall into three basic categories. First, while a survey of the population will provide, through attitudinal and behavioral data, a profile of the service needs of a community, studies can only reveal the behavior and attitudes of the client or consumer and the kinds of services that they feel they may require or prefer. The research cannot indicate what kinds of services are in fact currently available in the community. For example, the data may reveal that there is a preference or a need for a certain kind or amount of child care to be offered. However, the data will not indicate how many day care slots are currently being offered and funded by the Jewish community. In other words, the demand side of the equation will appear, but not the supply side. Therefore, in a needs assessment additional kinds of research would be necessary to compare information about what is needed with what is currently available.

Second, a community survey effort cannot serve as a marketing or fundraising vehicle; it is not a good way to contact a large portion of the population to ascertain their interest in specific services or their role as potential donors. The research may provide a profile of the location, income, and preferences in service areas, and it may reveal what kinds of issues appeal to donors and how much they may give, but it does not provide the names, addresses, or the mechanisms to reach those potential markets. Therefore, reaching the markets revealed by the research data also requires a different kind of research and set of strategies.

Third, survey research data do not set priorities. They may reveal a laundry list of potential needs and the degree to which they are preferred by certain client groups, as well as the overall projected need for certain kinds of services. But community survey research cannot establish or rank the priorities from among different service needs. Research may show that there is a need for five or six or fifteen different services, or no need for other kinds of services. But it does not indicate whether or not a service that is needed by 30% of the population is more important on the community's agenda than a service that is needed by 10%, or vice versa.

Conducting and Using Surveys

When To Do Community Survey Research

Demographic data should be collected every ten years. Data can then be analyzed and changes in the community can be monitored. However, many communities do not have the funds to conduct research every ten years, or, conversely, some communities may find that the need for updated information is critical, necessitating the need for more frequent studies.

The need for up-to-date data is a function of legitimacy and credibility. Data that are five, six, or eight years old begin to lose their applicability, but most of all they begin to lose their believability in terms of most community leadership. It is assumed that trends that were revealed earlier may have changed substantially either in degree or direction. Therefore,
the need for updated data is often a function of a changing social or political climate.

A wide range of community planning needs may require attention at the same time. These may include the location of a Jewish community center, the number of nursing home beds that are needed, assessing whether or not to initiate singles programs and what kinds, and so on. The more issues that are facing the community, the more pressing is the need for comprehensive research. A single issue, such as expanding the wing of a nursing home, should not require an extensive, comprehensive survey research effort.

Second, research becomes imperative if the community is stalemated on particular issues. The relocation of a facility, the desire to begin or cut a program, the need to expand the donor base of the campaign, and other issues may have reached either a political or a procedural standstill. Data can be used to help break particular deadlocks. Again, while it cannot solve political problems, survey research may serve as either a catalyst or as the mechanism to achieve a compromise or to provide a means to end the stalemate.

Third, survey research may be undertaken if there is a lack of direction in the community, or if certain procedures and processes appear to have become outdated. By providing new information, community research may also provide new direction, as well as reaffirm communal purpose and mission. It is not unusual to see leaders and others energized by the research process. Sometimes issues go unresolved because there is no clear direction. Research often points to certain solutions or at least to the proper framework within which to discuss solutions.

**Who Uses Research**

**Local versus National Data**

The need for national data is critical, providing a framework within which to examine local differences. However, local communities cannot rely solely upon data collected at the national level or on data from other communities. Each community is different, although few are unique. Various problems emerge in communities at different times. Mobility patterns, income and poverty levels, proportions of singles and of elderly, and many other factors vary substantially from community to community. Therefore, data collection at the local level is essential.

In Canada, the census collects basic demographic information about many groups, including Jews, but this includes no information about religious identity or behavior, nor does it explore issues relating to fund raising. Trends do emerge when examining community data from across the continent. If a community cannot undertake its own research, it should borrow from what has been learned in other places, and begin to assess programmatic or structural changes in light of what is known. Local leaders, however, are reluctant to use data from other communities. The essential roles of research in focusing discussion and providing legitimacy come into play. Data from other communities usually cannot provide the political clout that is necessary at the local level.

**Who Uses Research?**

Research should serve a broad set of constituencies within the community. These include the federation, which is most often the sponsoring agency for community-wide collection of data. Occasionally, in smaller communities, a Jewish community center is the primary collector and distributor of data. But in nearly all cases, the federation is the funding agency that sponsors and directs major research efforts.
The uses of the research should be broadly defined within the federation itself. A multitude of departments and divisions, including campaign, social planning, and human resource development involve both lay and professional groups. Therefore, community research should include components that meet each of these federation constituency needs. Since studies are conducted infrequently, it is better to include more types of questions than less, especially with such a broad range of users. Women's Division, Endowment Planning, and many other components of the federation may find particular parts of the research useful.

Users are much more broadly defined than the federation alone, even when the federation is the sponsoring institution. Constituent agencies, such as the Jewish community center, the Jewish family service, Jewish vocational service, and many others will find particular parts of the data useful in their own planning. Often, individual Jewish agencies are among the most active users of demographic data.

Organizations and synagogues and temples also find the data critically important in their planning efforts. Location issues, service delivery issues, and fundraising issues are addressed by all of these organizations, including Hadassah, B'nai B'rith and many others who find particular aspects of a study critical in long-range planning efforts.

Foundations can also find the data useful. Service needs and gaps can be examined by foundations to fund innovative programs or test models for different projects that might be initiated in the community. Distribution of funds can be dramatically assisted by comprehensive data.

Finally, the public at large is a primary user of research. When data are effectively disseminated in Jewish newspapers and through other media, the Jewish public can become much more familiar with important issues in the community. Information gathered in community studies may even assist individuals in locating a home, deciding to send children to school, and so on. The ripple effects of data that are collected have not, by and large, been quantitatively measured. There are, however, many impressionistic stories that have accumulated over the years that indicate that much of the Jewish public is quite aware of new survey research. Daily lives are often affected in many ways that are not systematically documented.

Input into a community research process from all potential users is essential for practical and political reasons. Those who will eventually use the data should have an important role in determining what kinds of data are collected. Soliciting information requests from all potential users is a key component in conducting research. By having a stake in the process from the beginning, potential users are far more likely to actually integrate new information into their planning processes. If potential users have nothing to do with the study design and execution, they are less likely to place much credence in the final product.

Elements of Survey Research

The success of research must be judged by the extent to which data are ultimately used. Such success is dependent upon a number of factors. First, proper funding must be made available. Where budgets are not large enough, the ability to properly carry out or implement community research is severely hampered. Sometimes communities are tempted to be too frugal with regard to the expenditures of their research effort. It is better to wait until proper funding is available, or in some
cases, not to attempt to do comprehensive research, rather than to do it incompletely or to compromise on quality.

Proper funding affects a second important factor, which is appropriate staffing. Adequate staff time is rarely allocated to completing a community research effort. The research process is usually assigned to the social planning and budgeting staff person, who is often already overcommitted in a wide variety of areas. Additional help is usually required for administrative and managerial tasks to flow smoothly. Improper staffing or overtaxing of staff may result in delays which sometimes recur, making the completion of the project impossible.

Third, appropriate committee structure is essential. These individuals must be communal leaders who have the confidence of broad constituencies in the Jewish community so that they can convey the legitimacy of the research to their peers. The committee should be comprised of community leaders with a variety of backgrounds and strengths, including rabbis, leaders of agencies and organizations, and individuals with academic or marketing expertise.

Studies also require rigorous methodological integrity. The legitimacy and credibility of community research rest on its social science credentials. If questions arise at any point concerning the quality of the data, either in the way it was collected, how the research was conducted, or the competence of the consultant, there is a great chance that the data will be rejected or underutilized by the community.

Federation cooperation with constituent agencies, synagogues, and Jewish organizations is also a critical factor in the use of the studies. Involvement must be widespread and ongoing, otherwise a large group of potential users may also reject the data. Therefore, involving all potential users, not only for purposes of input, but also for the analysis and implementation phases of the research is critical.

Cost Factors

Costs for Jewish population studies in particular communities can vary widely, depending on a number of factors. First, the process of data collection, such as mail, telephone, or personal interviewing has great influence on the cost. Mailed surveys, of course, are the least expensive, while personal interviews are the most expensive. Telephone interviews are usually the most efficient and feasible compromise in doing survey research. In addition, telephone interview screening is necessary to determine the size of the population.

The density and size of the population will also influence the cost. Since random digit dialing, a process of screening the general population for Jewish households, is utilized most often, the proportion of Jews who live in particularly dense areas will influence the cost. In an area such as San Francisco or Phoenix, where Jews are widely geographically dispersed, the cost for random digit dialing will be higher than in a community such as Hollywood, Florida, where the Jewish population is much more concentrated. In addition, in communities like Hollywood, the actual geographic size of the entire community is considerably smaller than in a community such as San Diego, and so the cost for making calls is considerably less.

Costs will also be determined by the number of reports that are issued and the degree of implementation that is planned. A small research report with no color graphics will cost considerably less than three or four lengthy reports with graphs, charts, and many statistical tables.
Often, research processes and budgets do not initially include adequate allocation for implementation. Planners may mistakenly assume that the research process includes only the activities that result in the preparation and publication of a final report. However, it is clear that the implementation phase, for which all of the data have been collected, is as critical as the others. Therefore, adequate budget should be included for at least the initial follow-up, dissemination, and designing of an implementation structure.

There are also “hidden” costs. Staff time, public relations, and the publishing of the reports are sometimes included and sometimes not included in overall budgets. It is important that these costs be budgeted because they can be quite substantial. Federations should be aware of the overall organizational commitment that is required and the costs attached to those requirements in order to complete studies.

Types of Reports

A variety of reports should be issued, each serving a different purpose. The first presents as much data as possible, a combination of compendium and encyclopedia, that can be used as a reference tool. This large report should not be viewed as a publication that individuals will read from beginning to end. The material is overwhelming, sometimes difficult to understand, and can be “boring” to read in its entirety. Few people, after all, sit down to read an encyclopedia. The large report should be utilized as needed for specific planning purposes. Therefore, when particular data are required for a planning activity, the report can be, and often is used as a reference to facilitate decision making.

Elements of Survey Research

A second report, a short executive summary, should be prepared, which includes the most salient findings from the research. This kind of document can be expected to be utilized from beginning to end. This executive summary should include those aspects of the research with which the research committee and federation leadership wishes everybody to be familiar.

Both the encyclopedia version and the executive summary should have easy to follow abstracts and graphics. These are often the parts of studies that are referred to most frequently. The most salient facts should be highlighted and presented in such a way that if the readers follow only these highlights, they will have gathered much of the essence of the report.

Policy and planning recommendations should also be included, either in the beginning or throughout the body of the report or, ideally, both. Interpreting the data is an essential component of community research and should not be left to the reader alone. It is up to the consultant to properly assist in providing for policy and planning recommendations through the research.

Reports may also be segmented by topic area. Some communities elect to issue separate reports on fund raising, social planning, or religious identity. These separate reports are often highly specialized and easily readable for select users. It is recommended, however, that if separate reports are prepared, basic demographic highlights should be included in all of the reports so that the background for planning or service delivery issues is contained in each document.

Short, brief, and succinct abstracts of one and two pages on a narrowly targeted topic are also useful. A two-page position paper on service needs of the elderly, or motivations for giving, can be distributed to appropriate groups of selected readers and
users. These abstracts can be used as agendas for particular meetings and can greatly assist in facilitating a decision-making process.

**Time Frame**

Jewish community survey research should take approximately two years. The process includes not only preparation of a report, but collecting input from potential users, designing the questionnaire, and an implementation process. Of course, the research could be conducted in a much shorter time frame. A more standard questionnaire could be utilized, input could be minimal, and the implementation could consist of the consultant turning over a report to the sponsor. Where this model is used, the implementation of the research is minimal. Without proper lead time and proper implementation time, the expenditure for the actual collection of the data is usually wasted. The community has to become acculturated to utilizing data, and incorporating usage in the planning processes. This is the most time-consuming, and most critical aspect of the entire process. To do otherwise would essentially be a waste of community resources.

**Use of Consultants and Volunteers**

While market research firms may be utilized to collect data, they are usually not prepared to engage in extensive community process, planning, and political involvement. Market research firms rarely have the time or the expertise, to fully participate in the Jewish communal planning process. Therefore, while a market research firm may be used in conjunction with other consultants who are planners, this component of the research process is a critical determinant of success or failure. A key issue to be examined in choosing a consultant and a market research firm is their ability to work with others as part of the study and implementation processes.

The use of volunteers to collect the data is also an issue. For the most part, volunteers should not be utilized for data collection. Using volunteers often compromises the quality of the information gathered and extends the time frame of the data-gathering process. The research process is already quite lengthy, and volunteers usually take months more to complete the process. However, if resources are very scarce, it is possible to use volunteers even if it is a secondary choice.

A wide variety of academic disciplines can be called upon when selecting a consultant. Individuals with expertise in sociology, planning, political science, demography, and other related fields may be appropriate. Strong survey research background, as well as an understanding of policy and planning implications are desirable. Willingness to work in a planning and political process is also important. Some consultants prefer to keep at arm’s length when doing this kind of research, while others prefer to become more actively involved. There are many individuals in the Jewish community, including academics at local universities, who are well qualified to conduct the research. Individuals with expertise in policy and planning research are the most desirable.

**Other Research Methods**

The research process should include a variety of research components, methodologies, and activities that support the desired outcome of utilizing data in the planning process. The first, and obviously most fundamental aspect of the research process, is the collection of data through survey research to provide a profile of the Jewish community as a whole. This would include
data on demographic, religious identity, philanthropic, volunteerism, and service usage patterns. An adequate sample must be drawn and a carefully constructed survey conducted, using proper statistical techniques. The data should be analyzed to give the background information necessary to examine needs, planning procedures, and so on. The survey is usually equated with the research process. It is essential to point out here that the collection of demographic and other data through a survey research methodology is only one component that can be used, even though it has been the primary and usually exclusive methodology used in the past.

The collection of qualitative data is also recommended. Certain subgroups do not appear in sufficient numbers for analysis in a telephone sample. These may include the developmentally disabled, intermarried couples who live in the outer suburbs, or givers of more than $10,000 to the campaign. While these groups may be oversampled when conducting the general survey, it is usually unwise to allocate scarce resources for the number of interviews that must be completed to insure reliability of the data for a very specialized subgroup. In addition, the kinds of in-depth information that is required is sometimes not easily attainable through the telephone survey method. The real motivations for giving, for example, must be explored in a more qualitative way with smaller groups. Therefore, focus groups, scientifically conducted interview sessions with groups of eight to twelve people, can be a very useful research methodology as part of the overall research plan. Focus groups can be expensive as well, so that the community must be very selective with regard to the kinds, number, and purposes for which focus groups are conducted.

Personal interviews may also be utilized. These may include select interviews with very large donors, agency executives, community leadership or other individual or groups of individuals who can provide very specific information and insight on particular planning issues. Personal interviews can be used to supplement both the focus groups and the quantitative data collected through the larger survey.

The community would also be wise to invest in an inventory of services that are available in the community through the use of a survey form which would be filled out by agencies, Jewish organizations, and others who deliver services in the Jewish community. The number of clients, the kinds of clients, the cost structure, and so on should be recorded and collated so that the supply side of the communal service delivery structure can be evaluated. If it is found that a certain number of preschool slots are needed, it should also be known what number of preschool slots are available in the community. The service inventory, which should be updated annually, can be extremely helpful in the budget and allocation process, so that not only does the community know what services are requested or desired, but also what services are available.

Agency data, particularly campaign data, should also be analyzed. If goals are to be set about fund raising potential, either through the number of potential donors, or their giving capability, it is imperative that the current structure be thoroughly understood. Therefore, data should be collected about the history of the campaign, number of households giving, current gift levels, histories of those giving, and so on. Data that are collected about attitudes and behaviors, toward fund raising, are more useful when such general information is available.

The methodologies listed above will help in a variety of planning procedures, but two fundamental issues remain. These include priority setting and devising systematic long-range plans
for achieving goals and objectives. Developing a priority-setting system is essential. The budget and allocation process usually is ill-equipped to handle the information that is collected through the research process. A whole range of needs is presented as a result of the research, but the importance and the order in which to approach them — their ranking in terms of community values and mission — is left largely unexamined. Therefore, concomitant to collecting data, a priority-setting system should be developed. It should actually include the ability to rank particular needs in terms of their importance and the order in which they will be addressed in the community. The failure to create a priority-setting system often results in the data being lost within the system or not utilized as fully as it might have been because there is no way to properly assign an order for handling each particular.

Furthermore, the research process also requires long-range planning. This includes defining a clear mission, setting goals and objectives, and devising strategies and tactics to meet those goals and objectives. Campaign needs, service needs, and community development needs all may be identified, but unless there is a systematic set of mechanisms to address these issues and a blueprint for action, there is a strong likelihood that they will go unaddressed or be met in a haphazard fashion. A community research process without a long-range planning system for implementation severely handicaps proper utilization of research.

Conclusion

It is clear that community research can be a valuable, if not critical, component in the overall operations of a Federation, or other Jewish community organizations and agencies. It is also equally clear that the proper conduct of community research, support services, and an understanding of the uses of research in the planning process are fundamentally important. The research process, in its broadest definition, will use a wide variety of methodologies, provide the necessary support services, and create the proper political environment in which to utilize the data. Research can serve as a catalyst to create fundamental change in an environment that tends to resist change. Research of course does nothing by itself. But it can lead to the most essential undertaking a community can initiate in order to achieve structural and programmatic change. Research and development provide one of the greatest opportunities for growth, change, and redirection.
Appendix: Successful Uses of Research

Community research has been used for a wide variety of purposes by a large number of users. Examples can be cited from communities all over the United States. The Jewish Community Centers of St. Louis and Washington, D.C., have used demographic data for service delivery planning, facility location decisions, and to create either new facilities or to expand existing facilities. The following are examples of successful use of research data as described by federation planners and executives from around the United States, in response to a questionnaire about the way their cities have made use of research.

Federation of Jewish Agencies of Atlantic County, NJ

1. As a result of the completion of the Demographic Study, a Long-Range Planning Committee was established with the following subcommittees:
   
   (a) Older Adult Services  
   (b) Programs for Singles  
   (c) Adult Services  
   (d) Services for Children and Youths  
   (e) Synagogue Relations (through the Board of Rabbis)  
   (f) Jewish Education  

   The purpose of the Long-Range Planning Committee is to review service objectives as established by subcommittees, to develop a statement of community priorities and integrate them into a long-range community plan. This plan will be coordinated with a long-range campaign plan on which we are working with UJA and hopefully will become a ‘development model’ for our community.

   It should be noted that this process sounds easier than it has actually been. It has been and will continue to be a tremendous amount of work to mobilize and motivate the resources to complete this task in an intermediate-sized community like ours with limited staff resources.

2. It would be next to impossible to compile a list of data requests from agencies and local organizations. Let me capsulize:

   (a) Both the Jewish Community Center and Jewish Family Service have utilized the long-range study in developing their own long-range plans. Jewish Family Service has completed and written up a long-range plan already and Jewish Community Center is in the middle of this process.

   (b) The Hebrew Academy and the Board of Jewish Education have cited the study in justifying educational programs in the community; in the case of the Board of Jewish Education, maintaining the high school based on the demographic forecast, and in the case of the Hebrew Academy, plans to expand the facility.

   (c) A number of synagogues have asked to utilize the Study in attempting to address the issue of affiliation. I have personally reported to a couple of the synagogues in the community on the results of the Study.

   (d) Jewish Older Adult Services has utilized the Study in documenting the need for further transportation and in the purchase of a van.
3. Follow-up research has included conducting focus groups among senior citizens (on three different occasions), intermarrieds and singles.

4. A compilation of the findings of the six subcommittees is currently being prepared and will be available in the near future.

I reiterate—although some of the work we have done sounds good on paper, our leaders are anxious to 'get on' with the process of developing new services and discontinuing duplicative or unneeded services.

Associated Jewish Charities & Welfare Fund, Baltimore

1. As follow-up to the Population Study, a Task Force on the Family was created as part of our Long-Range Planning Committee, and another Task Force on the Aged is soon to be established. Also, the Long-Range Campaign Planning Committee established sub-committees on outreach, Federation image and campaign impact and one on affluent non-givers and the first two of these sub-committees have completed their work which resulted in:

(a) The creation of a long-term upgrade committee chaired by two past campaign general chairmen which will identify, research and do individualized solicitation plans for affluent non-givers.

(b) The establishment of an outreach council as part of the 1988 campaign structure, which will provide

2Joel Daner.

Appendix: Successful Uses of Research

leadership and coordinate the efforts of a variety of new gifts and young people's divisions.

It would not be an overstatement to report that the results of the Study have generated a number of different processes to look at selected significant findings. Also, a number of agencies established long-range planning committees to deal with the data as they pertain to those respective agencies.

2. It is very difficult to report in a factual and organized manner on the data requests which we have received. Presentations were made to various synagogues and organizational groups, boards of almost all of our agencies and to long-range planning committees of many. In addition, highlights of the study were reported to about six other organizations in our community, including a subcommittee of the Planning Commission for Baltimore County. We have received requests for data from many development companies, particularly those planning for housing for the elderly.

The computer-generated tables of data were made available to many representatives of agencies and, of course, our own staff. Therefore, how and what they were looking for is not known in an organized fashion. You can assume that each of the task forces and committees noted above looked for data as they related to the focus of those respective groups.

3. The Subcommittee on Federation Image and Campaign Impact, comprised of members of the federation's Communications Committee, as well as campaigners, commissioned attitude research through focus groups. A report has just been received and is now undergoing analysis by
the Long-Range Campaign Planning and the Communications committees for action.

It is my impression that as a result of the focus group research and some of the initial findings, various approaches to campaign solicitation training, Super Phone Day, etc., will probably be changed or at least modified. For example, greater emphasis in our campaign literature will be placed on local services as compared to Israel-oriented material.

4. As noted above, following from your advice, focus groups were commissioned by both the Associated Placement & Guidance Service to determine, on an in-depth basis, reasons for reactions to that agency's services and focus groups were also commissioned by the Associated to gain further insight into the reactions of different constituent groups to the Associated itself.

It is fair to conclude that the findings of this research have been found to be enormously beneficial and will result in changes in the approaches of both APGS and the Associated itself.

As an editorial comment, you are keenly aware of the discussions that took place in Baltimore concerning the potential use of the data and the fear that the Study would have a lengthy shelf-life and not much more. It is fair to state at this time that the findings of the Study and use of the data have been factored into the deliberations of our community beyond anyone's expectation. Synagogues are contemplating significant changes, including relocation and consolidation. While I doubt that it will ever be possible to quantify the impact of the Study, virtually everyone involved with the process and connected to one or more entities which have used the data following

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Appendix: Successful Uses of Research

the study will agree that the Population Study had a profound impact on our community and was well worth the investment.

Jewish Federation of Metropolitan Chicago

1. We did not create any separate structures/committees based upon the results of the study itself. Nor would I maintain that the data alone, was the causative agent in the planning process. However, the results of the Population Study were used in several planning projects:

(a) Study of the Economically Disadvantaged. The data (however inexact) provided some boundaries to the problem of defining the poor and marginally poor, in our Project on the Economically Disadvantaged, a copy of which you already have. As you know from the study itself, the data was used as one source of input. After our project was launched, the structures regarding the problem, i.e., differentiating between economically disadvantaged and marginally poor, were ignored by agency and Federation leadership in presenting the problem to the community.

(b) The data was used as part of the program evaluation of an inter-agency program, the Response Center, a program that provided crisis intervention, counseling, medical and educational services to adolescents. The program evaluation was a multi-pronged approach including the use of agency data, client/staff questionnaires, and also the Population Study to indicate numbers of adolescents and geographic trends.

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3Peter B. Friedman.
Based upon the data and other trends, it was agreed to initiate outreach to additional suburban areas. Again I don't think the Population Study was the decisive factor, but it did help to reinforce views.

(c) Data was used to provide background information in a study about services to the elderly. Data was integrated with other sources of information to indicate basic characteristics of the Chicago Jewish Elderly and assumptions regarding future service delivery.

(d) Data was used to justify the placement of a Jewish communal building in a newly developing suburban area (northwest suburbs of Chicago) based upon the fact that the study showed that Jewish population was highly concentrated in three communities. In connection with other facts, it was decided to purchase a communal building in one of these communities.

(e) Synagogue affiliation institutes. Based upon findings regarding synagogue affiliation and Federation contributions, we developed an approach for working with congregations on a workshop basis (several hours) to discuss how to develop marketing approaches for recruiting and retaining synagogue membership. The population data, in addition to providing some overall background about the issues of synagogue affiliation were also used to provide a better understanding of the regional or community market in which specific congregations found themselves.

2. Use of data by agencies was uneven, although we did make presentations to every single Federation affiliated agency board, and to congregations on a regional basis. JCCs were the heaviest users, and requested specific information about the communities surrounding their centers, in order to develop a better understanding of the entire Jewish population they were serving. Our Council for the Jewish Elderly requested some information regarding trends and distribution of the Jewish elderly by income. One of our medical centers, Mt. Sinai Hospital, utilized some of the information in making a determination about whether to purchase a satellite facility.

And finally, our Jewish Vocational Service also requested information about community perceptions towards the agency. Overall, the data was not used as effectively by the agencies as it could have been. In part, the problem may lay with the Federation in not working with the agencies more closely and, in part with the agencies which are not prepared to utilize research information.

3. As a result of the study, we did do some additional research. Based upon the initial finding that over half of the households in the community reported giving to our Jewish United Fund, we conducted a validation study and determined that indeed the actual number of givers was substantially lower. This information was communicated to our leadership at a leadership retreat and helped to support some of the innovative campaign programming designed to reach certain target groups. Several focus groups were conducted to examine the reasons behind non-giving among residents in the northwest suburbs.
Jewish Federation of Greater Kansas City

In 1984, as a beginning phase of the update of the 1976 demographic study of the Jewish Community of Greater Kansas City, the Kansas City Federation commissioned a location study. The location study was utilized in determining the appropriate location for the Jewish Community Campus of Greater Kansas City, a forty-acre site which will house all major Jewish community agencies in the Kansas City area.

The location study, conducted by Dr. Gary A. Tobin, identified the present epicenter of Jewish population and projected population movement into the next 10 years. Based on Dr. Tobin’s projection, a 10-mile radius was drawn on a target map, within which an appropriate site was to be selected. Ultimately the site at 117th and Lamar in Overland Park, Kansas, was donated and did indeed fall within the projected 10-mile radius for the appropriate site.

The location study not only determined an appropriate future site for a major capital investment of the Jewish community, but also cited some reasons for the closure of facilities run under the auspices of the Jewish community. The study also reviewed other indications of population movement including new building permits, data from the Chamber of Commerce, utilities commission, AT&T, etc.

Back in 1982, the Jewish Family Commission (the main planning committee of the Jewish Federation of Greater Kansas City), conducted a study on child day care. A mail survey was sent to young families with children. This survey was a catalyst for the development of what is today the Early Childhood Education Center of the Jewish Community Center, located in Overland Park, Kansas. In the end of 1983 the Jewish Community Center chose to close its previous child day care center in Jackson County, Missouri. The new Early Childhood Education Center was opened at the request of the Federation and after the Child Day Care Study showed a significant need in Johnson County, Kansas among young Jewish families. The Federation helped secure capital funding for the Early Childhood Education Center. Today, the Early Childhood Center is a very significant part (one fifth) of the Jewish Community Center program and budget.

The 1986 Demographic Study of the Jewish Community of Greater Kansas City has served to stimulate a number of planning processes.

A community reassessment has been started which will analyze areas of human resource development, campaign, and priority setting in the Jewish Federation. The demographic study of 1986 will be utilized to cull background information on fund raising and service delivery priorities for this reassessment process which could shape the Jewish community of Kansas City in years to come.

The recently released Demographic Profile and Program Preference Survey of Kansas City Jewish Singles, dated August, 1987, included recommendations that a full-time community singles coordinator be hired to develop and implement a multi-faceted singles program consisting of age-segregated and community-wide singles programs. As a result of the sub-study of the omnibus demographic study, the Jewish Community Center of Greater Kansas City has received a grant to hire a full-time singles coordinator and greatly increased services to this target population.

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4Samuel H. Asher.
The omnibus study included information on Jewish education that has been used extensively by the Jewish Education Council of Greater Kansas City. In the spring of 1988, a college of Judaic studies will be inaugurated to meet the needs of continuing Jewish education in the community (identified in the demographic study). The College of Judaic Studies will be a community-wide approach to continuing education with participation from all synagogues. Both the University of Kansas and the University of Missouri of Kansas City will participate in the program.

The Committee on Aging of the Jewish Federation of Greater Kansas City is presently conducting a study of health and related needs of the elderly and the development of new services within the Jewish community with emphasis on the next decade. A firm will be hired to provide a market assessment for housing through extended care services (institutional as well as outreach). The study will utilize a special subset of data on those 60 years of age and older from the omnibus 1986 Demographic Study. Data will also be utilized from the Human Services Needs Assessment of the Jewish Senior Adult Population of the Greater Kansas City Metropolitan Area conducted in June, 1984 (Asher, Goldsmith, and Tobin, et al.).

Another substudy which might be developed could focus on the intermarried population in the Jewish community of Kansas City, depending upon the viability of the sample.

One report which was recently released by the Social Planning Dept. of the Jewish Federation of Greater Kansas City, conducted completely independently from the 1986 Demographic Study directed by Dr. Gary A. Tobin, is a Study of Members of the Jewish Community of Greater Kansas City With Developmental Disabilities, dated July 29, 1987.

Appendix: Successful Uses of Research

The study of individuals with developmental disabilities, although limited in scope, spurred the Jewish Education Council to develop classes for the developmentally disabled in the fall of 1987. The Jewish Community Center followed suit and developed a recreation/education and camping program for FY 1987-1988.

The survey recommends that a group home be established for the Jewish community in Kansas City. The Task Force on Developmentally Disabled will now move ahead with a feasibility study to determine what kind of group home could be developed, analyze programming and funding issues and make recommendations regarding the start-up of a group home. As there are very few large intermediate Jewish communities with Jewish group homes, this will be a great undertaking for the Jewish community of Kansas City. Questions regarding priorities and funding will no doubt arise. Nevertheless, it is significant that the issue of the disabled in the Jewish community is now on the community agenda, as a result of the needs assessment.

United Jewish Federation of MetroWest, NJ

Our experience has been extremely positive and the utilization of the information which was collected has been quite extensive. In fact, the application of the Population Study preceded distribution of the three major reports which have been published. For example, data from the Population Study was a key element in the new community priority-setting system for local agencies services which was initiated in 1986-87. Also, data from the Study were studied extensively by long-range planning committees on both older adults and the developmentally disabled and many of the recommendations which resulted from their

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5 Ronald B. Meir.
work derived from the Community Survey.

Following the publication of reports, further impetus was given to use of this data source. As you may know, the information which was collected on fundraising and volunteerism led directly to a comprehensive resource development program known as “MetroQuest.” Also, a new Long-range Human Services Planning Committee was established specifically to mine the data on population trends and human services in order to improve the network of Jewish community agencies and services.

In citing the varied applications being made by the Federation itself, I do not want to do a disservice to the numerous other community groups which have begun to use information from the Population Study. Without going into great detail, I can point to a number of our beneficiary agencies which have begun to draw on the data in their own planning efforts, as well as several synagogues who have considered population trends in making capital plans, etc.

While I personally hope that these examples turn out to be just the tip of the iceberg, it should be evident that the MetroWest Federation has made the utilization of data from the Community Survey a very high priority and one which will affect many aspects of the Federation’s agenda in the coming years.

In addition to the above, the study has been utilized in the following ways:

1. Community Survey Education and Utilization Committee was established.

2. Information used in briefings with beneficiary agencies, with a focus being to have agencies use the data for effective future planning.

3. Information provided when outside requests for data are obtained.

4. Information has been used internally by this Federation in: 3 to 5-year projections for long-range community services planning for singles, families with young children, teens and college youth by the Community Services Planning Committee; priority setting in the allocations process; The Commission on the Developmentally Disabled emerged as a direct offshoot of data derived from the study, as well as creation of the Committee on Community Services for Older Adults to address the growing needs of the elderly in MetroWest.”

United Jewish Federation of Greater Pittsburgh

The use of the data for planning purposes has been subtle. There are several instances where I think the study played a key role:

1. Validated revitalization on a Committee on the Elderly.

2. Used multiple times by the JCC in considering initiating (or retrenchment) of services to suburban areas (particularly programming for preschool and elementary school age children).

3. Was a critical element in the Federation’s decision to implement a community priority setting process.

4. Synagogues have found information in two areas of particular interest: Jewish education and intermarriage. How they have actually used it I can’t say.

*Jane Berkey.
3. Procedures

Various task forces, made up of community members, Budget and Planning and agency representation, clients and other interested parties, reviewed materials, undertook further, more specific studies, and developed program response recommendations. These were forwarded to the Budget and Planning Committee for priority setting, and funding is being pursued.

In effect, the study was the first step in a focused, but quiet, long-term community programming and planning approach.

Directly related to the findings of the demographic study and the awareness on a number of issues it raised, the Washington Jewish Community has established and funded programs on:

(a) An Information/Referral Service,

(b) Experimental programs regarding Substance Abuse and Alcoholism,

(c) The first stage of Vocational Services.

Earlier recommendations regarding the services were not successful in bringing changes in the past. It was the data from the study that sensitized lay leadership to how each of these components would meet larger communal needs.