

its agencies and are in support of programmatic functions. These should not be ranked in terms of priority-setting, but should be seen as part of the ongoing budgetary review of the agency. A very important principle in Federation work is that we not only support programs, but also attempt to strengthen agencies themselves as important community organization instruments.

Second, much of the work in priority-setting deals with decision-making as it impacts on the *increment* above the base budget. What can or should we do about the base budget itself? Should we have an ongoing evaluation process of the base budget? As stated above, zero based budgeting process is too politicized and time-consuming to have any major impact on priority-setting.

However, a program budgeting system for all agency programs may be helpful at least to identify cost centers for specific programs. It would also be beneficial if timely and *uniform* cost factors could be developed for programs by national agencies which would enable Federations to compare unit costs of the same program as delivered within one community versus another. This would probably be the only sound way to compare costs for similar programs. Unfortunately, many of these service statistics are not available. A more fundamental difficulty is the fact that a uniform format for distributing overhead among different programs has not been developed.

Third, an annual evaluation of newly-funded programs should be initiated. This is probably the only key op-

portunity for evaluation at agencies other than for programs which have clearly outlived their usefulness or are conspicuous problem areas. Evaluations should be as simple as possible, perhaps comparing the objectives which were laid out initially by the agency to those objectives which were actually achieved.

Lastly, it is essential to re-evaluate priorities on an ongoing basis. Perhaps a cycle of review every two or three years should be instituted to ensure that the priority-setting process is fresh and up-to-date.

What this article has now outlined is a process which will take into account a number of different variables, including needs identified through demographic surveys, judgments of leadership, agency assessment and input, program budgeting, evaluation and other notions. This is not an easy process, but I believe it is clearly preferable to the ad hoc process which takes place too much in our own communities.

In addition, if the priorities as outlined by the community are valid, and represent a proper consensus, then it also represents a blueprint for services in the future. To the degree that an agency can tailor its programs to meet those needs, consistent with its mission, the agency will be better for it, and so will the community.

While not a panacea for the ever-present problem of budgeting scarce resources for unlimited needs, priority-setting is, at least, an attempt to make some inroads into funding those services which best meet the needs of a community at a particular time. As such, priority-setting is a very valuable tool.

Designing Community Population Studies that are Used: A Model for Decision-Making

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... the population study is ... widely recognized as the single most important source of information about social change in the Jewish community.

Introduction

Probably the greatest obstacle to a community's undertaking a population study is the fear that it will not be used. Tobin and Boguslaw, for example, have recently noted in this *Journal* that "all too often we hear the complaint that a report, particularly a Jewish demographic study, 'sat on the shelf' after its completion."¹ There are two obstacles to the utilization of a demographic study for decision-making. The first obstacle is that the demographic study itself marks a transition to a new level of planning, thereby complicating the utilization of study findings. Second the demographic study itself disrupts the rhythm of Federation life and the flow of ongoing planning.

Because Federations do not routinely conduct large scale research projects, there are no established procedures for the integration of data into the decision-making process.

Thus, the decision to conduct a study implies the incorporation of a new or expanded model for planning. The normal allocations process which plans only for the year ahead will now be augmented by more "long range" thinking and the establishment of

"community priorities." Not only must the study findings be integrated into a planning process, that very planning process has been changed by virtue of the study. Procedures and planning structures are thus needed for the integration of demographic data into decision-making, and strategies must now be developed for the coordination of long range planning with the annual allocations process.

Addressing these problems in an organized and coherent manner is further complicated by the disruption which the study itself imposes on the rhythm of Federation life and the flow of ongoing planning. Even before the study has begun it has disrupted the on-going work of the planning staff who have added the responsibility of working with a demographic study committee. Once the study is funded, the planning staff must coordinate between the study committee and the outside consultant who will conduct the research² The demographic study committee further disrupts the work of ongoing planning committees, for as soon as the study begins, these committees must choose between postponing important decisions

¹ Gary Tobin and Nancy Boguslaw, "Developing a Data Utilization System for Jewish Demographic Studies," *Journal of Jewish Communal Service*, Vol. 60, (Winter, 1983) No. 2, p. 104.

² Steven Huberman, "Using Jewish Population Study Data for Decision Making: Theoretical Considerations and Practical Experience," in Steven M. Cohen, Jonathan S. Woocher, and Bruce A. Phillips, (eds.), *Perspectives in Jewish Population Research*, p. 48.

until the study is completed or proceeding without the benefit of forthcoming data.

The transition between planning models is facilitated by building in substantive and structural continuities between the existing planning process and the new planning process that will develop after the demographic study is completed. Substantive continuity means that the study addresses planning and policy questions which are clearly identified before the study begins. Structural continuity means that the study committee functions in a role similar to other Federation committees, so as to reduce the dissonance between the study process and more routine committee work. Taken together these two continuities mean that the process of designing the study is integrated into the structure of Federation decision-making and integrated with the issues facing the community.

This paper presents a model for achieving these two levels of continuity that is based on experience with five population studies (Denver, Phoenix, Los Angeles, Las Vegas, and Milwaukee) and one JCC planning study (for the South Peninsula of San Francisco). Substantive continuity is considered first, followed by a discussion of structural continuity. The paper concludes with an examination of potential content areas for inclusion in the study.

Creating Substantive Continuity

Substantive continuity is achieved by identifying, before the study is conducted, the decisions and other applications for which the data will be used. Both the questionnaire and the published reports are thus designed to address the issues which led to study. A continuity is thereby maintained between the research and the planning process even though a year or more may

pass between the inception of the study and publication of the report.

The study committee determines the substantive direction of the study through a two-stage process. In the first stage a number of possible content areas are identified, and in the second stage the specific content areas to be included in the questionnaire are selected from those identified in the first stage.

The term "content area" is used to designate a grouping of individual questions related by a common focus, such as the elderly or Jewish education. The content areas in the first stage are initially identified by the study committee through a series of interviews held with the planning department, other major Federation departments, and selected segments of the organized Jewish community such as synagogues and Jewish organizations.³

Planning is the primary use to which the study will be put, and the identification of planning issues should be the first task of the study committee. Planning staff, planning committee members, and sub-committee chairs should be interviewed first, followed by agency directors and presidents. Because agencies have their own planning processes which parallel and intersect with Federation planning, including agency planning needs with Federation planning needs at the beginning facilitates subsequent coordination between the two planning processes. Including agency planning needs from the beginning makes for good politics as well as for good planning. Inherent in the agency-Federation planning and budgeting relationship is a tension between the Federation's desire to do centralized planning and the agencies' desire to pre-

³ Cf. Gary Tobin, "Jewish Demographic Studies as a Planning Process: Coalition Formation and Applied Research" in Cohen, Woocher, and Phillips, *op. cit.*, pp. 22-23.

serve their autonomy and to chart their own course. Excluding the agencies at this stage tends to reinforce agency suspicions that the Federation will end up by compromising their self-determination. It is easy for agencies to conclude that the demographic study somehow be used as a tool to contravene their own planning.⁴ Extensive participation in early phases of the study not only ensures that agencies will understand the nature of the study itself, but also introduces them to the kind of planning that will take place when the study is completed.

Following the interviews with agencies and the planning department, the study committee should elicit input from other Federation departments, particularly the campaign. Campaign departments typically do their own planning (e.g. new gifts), and the leveling off of Federation campaign results in recent years poses a serious problem for the maintenance of existing services, let alone the expansion of existing services or the introduction of new ones.

Finally, the study committee should hold discussions with representatives of Jewish organizations and synagogues. At the very least such discussions have important "P.R." value not only for the Federation, but for the study. The more publicity that can be given to the study (from the pulpit, in meetings of organizations, as well as through other media) the greater will be the degree of participation in the study among respondents. More importantly, while taking the "Jewish pulse" of the community may not be directly related to planning social services, it is part of the Federation's obligation as the "Central Address" or "Framing Institution."

Once the committee has compiled a list of content areas, it must then decide which ones to include in the study, since

⁴ Gary Tobin, *op. cit.*, p. 25.

not all issues can be addressed in a thirty minute questionnaire. Similarly, they should also decide how much importance should be accorded to the issues selected, since this will be translated into minutes of interview time.

Since the goal of this process is to produce a study that has practical applications, usefulness for decision-making should be the primary criterion for inclusion of possible content areas. Toward this end, the committee can ask the following kinds of questions:

1. What plans have been made to use this information? Is there a committee that will examine the findings? Is a decision or recommendation likely to result from having this information?
2. If so, is the specific information requested relevant and appropriate to the decision?
3. If yes, how crucial is the information requested? How well could the committee function without it? What would happen if the information were not available?
4. How important are the issues for which the information is requested? Are they of high priority to the community?
5. Can the information requested be used for more than one audience? Will it shed light on more than one issue?

The resemblance of these questions to the kinds of questions that are typically asked in budget hearings is not coincidental. The allocation of limited questionnaire time is not unlike the allocation of available resources.

Further, the exercise of asking these questions is itself a sound planning technique. By concentrating on how information will be used the study committee must give some thought to its long range planning process. For example, if a particular content area (such as intermarriage) is considered important, but there is no committee involved with intermarriage and no decisions will result, the study committee should point

out the need for planning in this area at the same time that it commits itself to inclusion of the substantive area.

Structural Continuity

Structural continuity is created in three ways: through the respective roles of consultant and study committee, through the composition of the study committee, and through the follow-up process after the study is completed.

Jewish population studies are typically conducted by outside consultants. Involving an outsider is in itself a source of discontinuity since the consultant usually has only limited familiarity with the Federation process (although this situation is improving). It is thus a grave mistake for a study committee to ask the consultant to "come up with the answers." Rather, the consultant should be asked to function as other Federation staff function: by providing information which helps policy makers reach decisions. Thus, in planning a demographic study the consultant explains the policy ramifications of technical decisions to the study committee, which in turn makes the policy decision. For example, the consultant can advise the committee on the cost ramifications (in time and therefore dollars) of a particular content area. The consultant can also advise the study committee on the policy implications of various sampling designs by pointing out which groups are likely to be excluded, and to what extent.

This model in no way diminishes the responsibility of the consultant for conducting the study. The consultant still designs the sample, puts together the questionnaire, analyzes the data, and writes the report. Because the study committee has been involved in decisions about each of the tasks listed above (even the outline of the final report can be viewed as a policy decision), it will be clear why certain questions were asked,

why the sample was collected in a particular way, and why certain emphases are in the final report. The study is less likely to be seen as a mystery than as a tool.

The makeup of the study committee is another source of continuity with the planning process. Because it has important decisions to make, the study committee should be made up of the "best and the brightest." The study committee should include people from all sectors of the Federation and Jewish communal life, but they should not be selected only to represent the views of those sectors, however, since that sets up the study committee as a forum for adversaries. Rather, those individuals (both lay and professional) should be asked who would identify with and contribute to all aspects of the study while at the same time providing counsel from their own organizational experiences. For example, the committee should have agency representation without its being representative of every agency.

Suggested Content Areas

Jewish communities have many similarities, and there is no need to build each study anew. The study committee can learn from the experience of other communities, bearing in mind, of course, what makes its community unique. Just as the decision-making model described above builds on the experience of other communities, so it is that the following content areas are recommended on the basis of that experience.

Demographic Data:

Demographic items such as age, sex, marital status, education, occupation, labor force participation, and income are the kinds of information most re-

quested by the community. Demographic items are used by planners to define and count "target populations" such as children, the elderly, vulnerable families (such as single parents), and the poor. These are the "core items" in a "demographic study."

Questions for Special Populations:

Special questions related to service delivery can be included for respondents who have special service needs (i.e. "special populations"). For example, previous studies have included questions specifically for the elderly, singles, intermarrieds, unaffiliated, unemployed, and so on. Demographic questions identify these special populations, and "questions for special populations" provide specific information about their needs.

Service Usage:

Planners need to know more than just the size of the target populations. They need to know the number and characteristics of potential users of Federation services. Since the services provided by Federation agencies are also available in other public and/or private auspices, not everyone who is eligible or needs a social service will turn to the Jewish community. The Boston study of 1965 pioneered a set of questions about the relative interest in and use of Jewish community services.⁵ These questions have been adapted, repeated, or expanded in a number of subsequent demographic studies. The respondents who indicate that they are interested in and would use (or have used) Federation services are described by variables

⁵ Morris Axelrod, Floyd Fowler, and Arnold Gurin, *A Community Survey for Long Range Planning*, Combined Jewish Philanthropies of Greater Boston, 1967.

such as age, income, and family structure to create a profile of the current and/or potential service population. This is similar to the concept of "market segmentation."

Campaign:

As campaign planning has become more sophisticated in recent years, the importance of information about Jewish giving has increased. At the very least the study should include questions which will identify non-givers. The Denver, Phoenix, and Milwaukee studies went further by including questions which explore motivations for giving and feelings about campaign.

Affiliation:

Basic questions about affiliation with synagogues and Jewish organizations have been included in every major demographic study.⁶ They are part of the Federation's obligation (described earlier) to take the "Jewish pulse." They are also important for planning, particularly in regard to Jewish community centers and no less for campaign planning. The area of affiliation can also include questions related to Jewish identity, Jewish observance, and extent of the respondent's and spouse's own Jewish background.

Intermarriage:

Since the National Jewish Population Survey startled the public over ten years ago with its findings on intermarriage, this issue has been of increasing concern within the organized Jewish community.⁷ Intermarriage is measured by

⁶ Steven M. Cohen, "An Annotated Inventory of Questions for Local Jewish Population Studies," in Cohen et al., *op. cit.*

⁷ Fred Massarik and Alvin Chenkin, "Explorations in Intermarriage," *American Jewish Year Book*, 1973, pp. 292-306.

questions which identify respondents and their spouses as either born Jews, converts (i.e. "Jews by choice"), or non-Jews. The reports published in Denver, Phoenix, and Milwaukee demonstrate that intermarriage is related to many areas of planning and organized community life from Jewish schooling and service usage to fertility and residential mobility.

Residential Mobility:

Residential mobility is the second most requested content area (after basic demographic items). Information about patterns of Jewish movement helps planners to anticipate the emergence of Jewish areas and estimate the prospects

for stability in older neighborhoods. In the Sunbelt, questions about residential mobility have provided information about the scope and impact of recent growth.

Conclusion

While often maligned, the population study is nevertheless widely recognized as the single most important source of information about social change in the Jewish community. Linking the process of planning a population study more closely to the structure and style of Federation life is an important step that leads to increased utilization and makes it a more integrated component of Federation planning.

Twenty-Five Years Ago in this *Journal*

The romantic concept of grace coming down from above implies that man is not free to decide in favor of the good. Neither is he the person who originates evil. Sin overcomes him and compels him; it is original. Man is not the one that seeks and strives, wins or succumbs. He merely reacts to the contest between the devil and the savior. This dogma removes the very ground from under man's rights as a moral and ethical individual. Moral freedom to achieve that which is good is negated. Predestination and predeterminism are instead emphasized. The logical conclusion is the anarchical principle of Gnosti-

cism, "everything is permitted," notwithstanding the moral demands made by those who were still rooted in the Old Testament and in traditional Judaism.

Nothing could be more opposed to the aspirations of a social conscience than romantic piety which only seeks itself and its salvation. Romantic passivity is the reason for the alliance between ruler and believer wherever romantic religion has held sway; every reaction has been consecrated and every forward drive damned.

MELECH SCHACHTER, Ph.D.
Summer, 1960

Understanding Synagogue Affiliation*

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... people who are involved in one aspect of communal life "spill over" to other areas of involvement. Members of Jewish organizations are likely also to belong to synagogues and to give to Jewish philanthropy. Organizations frequently see themselves in competition for the same members and same donors. Although this is an organizational reality, there needs to be greater recognition of "the more, the more."

AFFILIATION with the Jewish community can take a variety of forms. It may involve contributing to the Jewish Federation, belonging to Jewish organizations, participating in the activities of Jewish agencies, or joining a synagogue. The focus of this article is congregational affiliation—formally belonging to a synagogue. This type of affiliation reveals a great deal about the intensity of Jewish life in a community.¹

Although there has been an enormous increase in demographic research on Jews in the past decade, we know very little about who are the "unaffiliated." A major goal of this article is to identify the factors associated with affiliation and non-affiliation. By expanding our understanding of these population groups, we can more effectively plan strategies to attract the unaffiliated into the organized Jewish community.

*The following persons reviewed this article and were extremely helpful in this project: Ted Kanner, Jewish Federation Council of Greater Los Angeles, Executive Vice President; Merv Lemmerman, Executive Director; and Ilene Olansky, Vice-President.

¹ Formal Jewish communal affiliation may occur in at least five different spheres: religious-congregational, educational-cultural, community relations, Israel-overseas, or social welfare. Recent patterns of activity in these five affiliation spheres are elucidated in Daniel Elazar, *Participation and Accountability in the Jewish Community*. New York: Council of Jewish Federations, 1980. The thrust of our study is the religious-congregational sphere.

The findings in this report are based on the Los Angeles Jewish Population Study, a random telephone survey which included 823 completed interviews with Jewish households in 1979, a population survey updating, and recent literature on affiliation. The major focus of the research was demographic—measuring the size, composition, and distribution of the more than 500,000 Jewish residents of Greater Los Angeles. Synagogue, organizational, and philanthropic participation were also studied. At approximately the same time this research was being carried out, the University of Judaism conducted a study on Jewish identification among 413 randomly selected respondents. Since there was considerable similarity between these two research studies, several of the findings from the University of Judaism inquiry are included in our analysis.²

The findings from these various inquiries shed light on the dynamics of being Jewish in Greater Los Angeles, the second largest Jewish community in the United States. In addition, our data illuminate changing patterns of Jewish-

² The University of Judaism study was directed by Dr. Neil Sandberg and Dr. Gene Levine. The 1979 Federation study was designed and directed by Dr. Bruce Phillips. This article also incorporates material derived from a 1981 data update and a 1983 reanalysis. Although the observations in this essay relate to these specific dates, we believe the patterns described hold true today.