

Developing a Data Utilization System for Jewish Demographic Studies

GARY A. TOBIN, PH.D.

Urban Studies Program, Washington University, St. Louis
and

NANCY BOGUSLAW

Jewish Federation of St. Louis

... data will not be properly utilized unless users are identified, purposes are delineated, a process is developed, and structure is instituted. If each of these facets is considered and planned properly, then the collection of demographic data can be a great asset to a community.

1. Introduction

An increasing number of Jewish communities are in the process of planning and conducting, or have completed, population studies. Forty such studies have been completed over the past decade, and at least another dozen are either underway or in planning stages. While a number of rationales are usually given for funding these studies, the need to facilitate planning of services is the one that is used most often, particularly by professional staff.

The rationale is a sound one; the information gathered through demographic and attitudinal survey research can enlighten and help guide the decision-making process. The relationship between data collection and decision-making, however, is one that requires careful planning. The link is theoretically explicit, but difficult to implement. The use of data in the planning process, particularly the proper use, is a difficult goal to achieve. All too often we hear the complaint that a report, particularly a Jewish demographic study, "sat on the shelf" after its completion. Disuse and misuse are major problems with such research and encourage opponents who claim that these studies are a waste of valuable community resources.

Careful design for the use of a demo-

graphic study must be an integral part of the study process. Indeed, the study process must include an "action" component within its design, discarding the notion that a study is complete when all the data have been collected and a "final report" has been prepared and delivered. In a sense, this is when the process begins its most important phase—utilization of the information that has been processed.

This article discusses the design of a demographic data utilization strategy and a structure to implement that strategy. The Jewish Federation of St. Louis demographic study is used as a case study. This community carefully designed the demographic study process to insure the use of the data in the planning process and therefore offers a significant model.

The process in St. Louis is characterized by the notion that the proper use of demographic data requires careful conceptualization, planning, and strategy. Staff, lay people, and consultants must effectively plan to do planning. Moral, ethical, political, financial, and administrative questions influence the planning of data utilization and must be carefully incorporated into the decision-making system.

Demographic studies provide two basic products. The first is a written report, or series of reports, usually char-

acterized as "the final report," or "the demographic study." This document, or series of documents, usually includes basic frequency distributions (counts), percentages, and cross-tabulations (how many of one item by another; e.g., how many children under the age of 10 attend all-day religious school?). This report is usually distributed in the community and to other Jewish Federations and receives some media attention. It provides a basic overview of the Jewish community in terms of general demographic characteristics and, sometimes, attitudinal data. This document can be used for broad policy outlines, educational purposes, and as a reference book for general information about the local Jewish community.

The second product is the data tape, where all the processed information has been entered and stored. This tape constitutes an information bank, where data can be retrieved as needed, or where follow-up data, if collected, can be stored. If the data have been carefully collected and processed to meet the needs of different users, this data bank constitutes an enormously rich source of information that can be manipulated for specific planning purposes. For example, the final report will probably include a profile of the population by age and geographic location. But suppose a "meals on wheels" program is being considered. In this case, the agency may want to know the age and geographic location and the proportion of households that keep kosher. If the sample is large enough, specific planning questions can be aided by utilizing the data bank.

The utilization of both the report and the tape needs to address the following issues:

- 1) Who are the users?
- 2) What are the functions that demographic data collection can serve?
- 3) What processes will be instituted to utilize the data?

- 4) What structure will be developed to administer data utilization and integrate it into the decision-making process?

Users should be broadly defined, even if the sole sponsor of the study is the Federation. The reasons for this broad user-base are many. First, these studies are expensive and are done infrequently. The most efficient use of community resources is served by developing a data base that is accessible to the maximum number of users. Second, sharing data also facilitates cross-fertilization of ideas and personnel in a given area, such as housing for the elderly, or services for the disabled. Third, the use of data affords the opportunity for all constituents to have a common knowledge base. Speculation, second guessing, and information gaps can be reduced. With these uses in mind, the users should be identified as professionals and lay leaders in the Federation, agencies, other Jewish organizations, chapters, synagogues and temples, and the Jewish public. Other non-profit agencies, such as the United Way, may also find the data useful. This represents a vast pool of potential users, and, therefore, the proper use of the data, as well as processes and structure, must be carefully outlined.

The data may be used in the following ways, as outlined by Robert Merton in 1947:¹

1. Diagnostic: Determining whether action is required. (e.g., should a facility for the developmentally disabled be built?)
2. Prognostic: Forecasting trends to plan for future needs (e.g., the number of potential students for day schools).
3. Differential Prognosis: Determining choice between alternative policies. (e.g., should we build a Jewish community center in one location or another?)
4. Evaluative: Appraising effectiveness of ac-

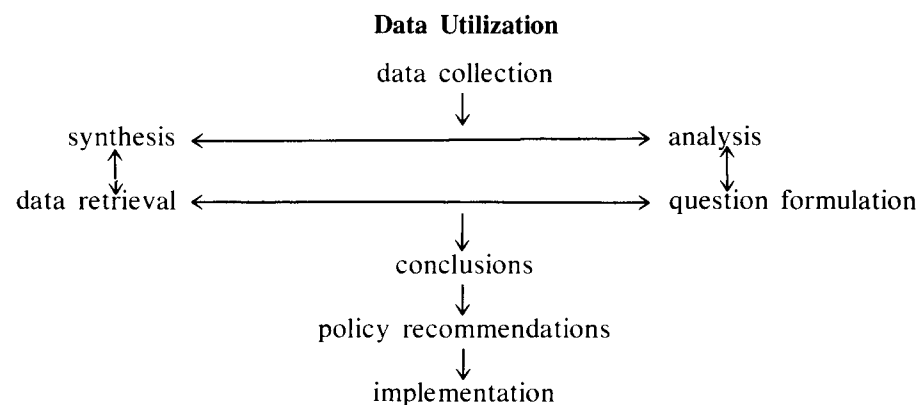
¹ Robert K. Merton, "The Role of Applied Social Science in the Information of Policy: A Research Memorandum," *Philosophy of Science*, Vol. 16, 3 (1949), pp. 161-181.

tion program. (e.g., how effective are current Federation campaign techniques?)

5. General Background Data: Of general utility or serving diverse purposes (e.g., age, distribution of population, general location, religious practices).
6. "Educative" Research: Informing publics about pertinent data and particularly countering misconceptions. (e.g., Anti-Semitism is decreasing in a particular area, when personal experiences indicate the opposite.)

Functions "2", "5", and "6" can largely be served by the final report. The client users are primarily the general Jewish public, who can be addressed through publications, media coverage, lectures, workshops, and often educational and promotional activities. Functions "1", "3", and "4" are more complex and will require further use of the data stored on the tape. Data from other sources within the Jewish community will be needed as well, such as agency data or service loads, programs offered, and so on, as well as data outside the Jewish community, such as employment and housing data. Regardless of the particular use or the particular client user or the particular function, careful planning of the structure and process for a successful planning system must be accomplished. These are discussed below.

The intellectual component of this process may be defined as a planning loop that can be conceptualized in the following way:



The *synthesis* of the data entails structuring the data in such a way that it can be analyzed with policy implications in mind. The *analysis* suggests that a thorough knowledge of the available data at hand is made and further *questions are formulated* and more data are *retrieved*. This process continues until the group of users is satisfied that they are ready to draw conclusions. There is no logical "final" end to the process, since the permutations are infinite, and further data may always be added. At some point, conclusions must be drawn, and with input from other sources (budget, input from other experts, and so on), policy recommendations are made, and, it is hoped, are implemented. This, of course, is an ideal model, and cannot account for serendipity influences, such as unexpected budget changes in a service area, change of administration in the Federation, and other factors. This process does not ensure an outcome, but, we hope, will facilitate planning of desired outcomes.

2. Utilizing a Demographic Study

This section of the article will focus on the St. Louis experience; how and why the demographic interpretation committee was formed, the desired outcomes, the dissemination phases and the overall benefits for the community.

During the past decade, the Jewish Federation and its constituent agencies have devoted significant resources to their planning activities. The Community Services Planning Committee (CSPC), the Federation's planning mechanism, proved to be a most effective forum to discuss the need for a demographic study. It was through the CSPC that communal service leaders recognized the dramatic changes and complexities of communal service delivery. The continuous requirements for critical information on changes in family patterns, population shifts, needs of the elderly and youth population, and so on, fostered an imperative need for demographic information to assist leadership with policy decisions.

The community was committed to ensure that the demographic study would have a "zero shelf life" and would be used as a practical planning tool for a long time. It is important to note the fact that the demographic study was not viewed as a replacement for the sophisticated and well-developed planning mechanisms existing in the community, but rather as a tool for either verifying previously held beliefs or feelings or showing new trends or patterns regarding the community and future service needs and trends. It was the belief of those involved that a thorough interpretation of the study would facilitate the improvement of program planning and program development, and serve as a tool to improve priority setting and to educate the public, lay leaders, and professionals.

3. The Demographic Interpretation Committee—Process, Goals and Objectives

A demographic interpretation committee was carefully chosen. The goal was to select a committee that was a broad cross section of the community

which could look beyond the parochialism and "turf protection" of any particular agency or service. Past planning chairmen, current committee leadership, agency representatives, campaign and budget members were part of the process. It was the desire to develop and nurture a cadre of individuals who would become highly knowledgeable and familiar with the major aspects and highlights of the demographic study, assuming that a leadership which shared a common knowledge base would improve the decision-making process. At least one staff person, and usually two, attended every meeting and worked very closely with the lay group. Staff, lay people, and the consultant shared tasks throughout each phase of the process.

It should be noted that the involvement of professional staff and lay leaders was an essential element throughout the study process. Careful attention was given to the promotion of the study and participation in the study during its design and data collection phases. The formation of a coalition that is vested in the study process is an essential element to the data utilization phase when the data have been collected and processed.²

A. The Process

The demographic/attitudinal study yielded over 200 written pages and over 250 tables; thus, the process of interpreting the study could be an overwhelming task. At the outset of this undertaking, it was determined that a very thorough, systematic and well-conceived process must be developed.

² This process is detailed in Gary Tobin, "Jewish Demographic Studies as a Planning Process: Coalition Formation and Applied Research," *Perspectives in Jewish Population Studies*, Brandeis University, 1983.

After a few meetings with the statistics consultant, Federation staff, and planning chairman, the following approach was developed:

- Phase I — Synthesis and Analysis of the Data
- Phase II — Question Formulation and Data Retrieval
- Phase III — Conclusions
- Phase IV — Policy Recommendations and Implementation

Phases I and II addressed the questions: who and what is the Jewish population of St. Louis; income; household sizes and types; educational levels; etc. The goal was to insure that all understood the make-up and composition of the St. Louis Jewish community. In most instances, previously held feelings were confirmed about the Jewish community, but there appeared some surprising statistics on the number of both young and old Jews living at poverty level, the high degree of in/out migration of the community, and the large number of children under the age of five in zip codes not part of the traditionally known areas of the Jewish community. The data contained a number of other "surprises," as well.

Reviewing the population/demographic profile of the community took three initial meetings. At each meeting specific tables were reviewed and questions were developed for additional data retrieval. Questions were raised regarding the number of children living in a particular geographic location; affiliation patterns of families; where low-income, service-poor reside; where singles live; and incidence of single-parent families. Phases I and II were usually conducted simultaneously. It is important to the process that consensus be achieved.

Each session was spent thoroughly reviewing a particular service or population group; e.g., children under the age of five, services to the elderly, devel-

opmentally disabled, youth, etc. There were ten basic areas covered which were focused on life cycle, religious identity and affiliation, service uses, and priorities.

Members were required to invest time reviewing the appropriate written sections and tables. In advance of each meeting, members received an outline of appropriate tables to study and were required to come prepared with questions, statements, or general comments. Each meeting format was basically the same: a discussion of what the demographic tables, charts, and graphs meant; what other additional data were needed to be retrieved and reviewed; and how the committee could best respond to the data. Once the synthesis occurred, the additional information was brought back to the committee for general comments regarding the population in a particular area of service. Staff helped guide the meeting and the consultant was used to help in the technical aspects of the data analysis.

The magnitude and scope of the task can be illustrated by a specific example. The demographic study reported that 32 percent of the female population works 35 hours or more per week. Of the 32 percent, 17 percent have children under the age of five. Nine percent have indicated that they plan to use day care within the next five years. Translating this into actual numbers, this means that there are approximately 600-800 households that plan to use day care. Logical questions for planning purposes are: where are these households located; what is the composition of the family; what are the income levels; what are the affiliations with the Jewish community?

Concurrent with Phases I and II, it was essential to obtain information regarding current service delivery capacity in the Jewish community. Taking the above illustration as an example,

there are currently a total of 115 day care slots for children ages 2½ to 6. There will be a need for additional day care slots, either within or outside the Jewish communal service structure. This kind of analysis is essential in planning for a community of encompassable size. A planning department should be able to conduct the inventory of existing services and needs with relative ease.

The timetable for Phases I and II will depend in part on the type of survey research conducted. The process of synthesis and data retrieval is anticipated to take three months.

Phases III and IV, conclusions and policy recommendations, are the most difficult ones and will require greater deliberation and thought. The goal again is not to interfere with the planning of agencies, but to encourage professionals and lay leaders to understand the broader, more community-related issues and needs. It is the intention to design a comprehensive planning report based on Phases III and IV. Some general recommendations will be made regarding service delivery network gaps and areas which require greater service and coordination. For example, the study shows that a large pocket of service-poor elderly live in a specific zip code. The recommendation might be to encourage greater service delivery networking in that specific area. This recommendation would come after a thorough review of possible services in the area or transportation access problems. This general recommendation will be taken to the overall Council on Aging which oversees the plans for the elderly. It must be remembered that a broad section of the community and each of the chairmen of our major committees (such as the Council on Aging, Developmentally Disabled, Children and Youth) also are on the demographic interpretation committee. From this kind of action planning, it is hoped to en-

hance existing services and inform the community of the needs and problems as presented in the study efforts. The utilization of professional staff efforts in this phase was extremely important.

Once Phases III and IV are completed, the general report will be submitted to the Community Services Planning Committee for their input, review, and validation. Consistent with current processes, the Jewish Federation Board of Directors would then be the next appropriate body to receive the report.

4. Education and Dissemination

In conjunction with the analysis of the data for planning purposes, an educational campaign for the community is also being conducted. The Federation's Planning Department prepares a regular column in the Jewish community newspaper, which features "Facts About Us." Each column features a major component of the study, citing statistics and trends. It is hoped that not only the Federation and constituent agencies will benefit from the data, but that organizations, synagogues and temples will better understand the data and trends for their own planning purposes. Community seminars are being planned after the Community Services Planning Committee has thoroughly reviewed the entire demographic report.

The dissemination aspect of the demographic study has probably been the most relevant for community planning. The dissemination phase is the link of the Federation to the total community. At the Federation, staff developed a system for data retrieval, knowing that additional information would be needed for further analysis. Agencies or organizations requiring more information were asked to complete a simple form, specifying the type of additional information that they needed for their own internal purposes. This was then sub-

mitted to the Federation in order that it have a central role in monitoring the types of questions being asked. For example, two agencies could be requesting the same information on the number of children between the ages of birth to 5 years living in a specific zip code area. The Federation, functioning as a clearinghouse, could coordinate the various questions, have a better understanding of the kinds of information and concerns of the community and, also, avoid wasteful duplication.

The consultant met with synagogues, temples, and organizations. To further exemplify the importance of the dissemination function, the consultant met with several professionals and agencies that deal with community relations and issues. This function was critical so that data users were not merely presented with a report. They were informed on how data could be retrieved, how to use the tables, and how to interpret the data. Over thirty such meetings have been held, and more are scheduled.

The usefulness of the dissemination function can be illustrated as follows. According to the study, 25 percent of the respondents reported that they had experienced anti-Semitism in the St. Louis area in the twelve months prior to the study. After the consultant met with the agencies concerned with this problem, it was agreed that more data and profiles must be obtained to understand further the nature of the concerns. This would include data on income levels, age, place of birth, and occupation. This type of analysis will enable the agencies to plan for specific programs and Federation services. Without dialogue, discussion, and further analysis, the data on anti-Semitism may not have been used effectively. A dissemination phase is critical to the success of community planning, as it permits agencies to better use and understand the available data for planning.

It is also important to point out that the Community Services Planning Committee is taking the initiative in interpreting the total demographic report. This has served to strengthen the role of community planning and permits the CSPC to fulfill its function as the central planning and coordinating body. It is hoped that through the actions of analysis, education, and dissemination, the CSPC will further strengthen its role in the community by becoming even more in touch with community issues.

5. Conclusions:

The Benefits to the Community

The benefits of this process to the community are significant. The demographic study will enable concrete decisions to be made based on facts, such as location of services, expansion or curtailment of services, and will enable our community to make the right decisions with financial backup.

The demographic study has also served to strengthen the central role of the Federation and its constituent agencies. The demographic study has produced the basis for further analysis and a foundation for the evolving agenda and program of the Jewish Federation and Jewish community.

Mindful of the tremendous pressure for efficient employment of contributed dollars, and with cutbacks in government funding, the Federation Board and demographic committee believe that the cost is an excellent investment of community dollars, since the information will provide vital data that will enable informed judgments in a number of areas such as community planning, allocation, fund raising, implementation of new service expansion, facility planning, and discontinuation of services no longer needed or useful. In a very short

time, the study will more than pay for itself. One proper decision in location based on good data can save the community hundreds of thousands of dollars. It will help the community reach a consensus on a variety of problems, provide an excellent profile of the community against which local concerns can be investigated, and provide important baseline data around population shifts, geographical shifts within the community, and basic attitudes towards community institutions. The demographic study has provided an excellent means of developing closer working ties among the Federation and its agencies, congregations, and organizations. Certainly, in light of increasing financial challenges facing the community, cooperation is of critical importance.

None of the benefits, however, would have been realized if steps had not been taken for the systematic use, analysis, and dissemination of the information. This organization of data use has been the key to the study being utilized to its maximum potential. Conducting a study is only as beneficial as the extent to

which it is used. In a time of scarce resources, as much attention must be paid to the analysis and implementation steps of a study as to the collection of the data. With proper planning, the potential for community use is substantial.

The St. Louis model is only one of many possible systems. It is offered not as a blueprint, but as a suggested schema for the planning and the use of the data collected in community studies. It puts forth the premise that data will not be properly utilized unless users are identified, purposes are delineated, a process is developed, and structure is instituted. If each of these facets is considered and planned properly, then the collection of demographic data can be a great asset to a community. If such measures are not taken, then a community risks wasting community resources by not using a study to its maximum potential. This is not to say that a study will not be used in ways that many have anticipated: subtly influencing decisions, changing perceptions, and so forth. But to achieve more than serendipity use, careful planning is essential.