

Guidelines for the Design and Use of Jewish Population Studies

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The process of conducting a Jewish population study is deceptively simple: make the decision, hire a consultant (or designate a staff member), write a questionnaire, make the phone calls, compile the results, and write the report. Yet in practice, many pitfalls can make the conduct of a Jewish population study a veritable nightmare. Perhaps the most fearsome spectre is that of a study conducted with great fanfare and at great expense, that in the end produces nothing of value in terms of the goals and needs of the Jewish community itself. Technical pitfalls can be avoided by using competent researchers. But only the federation itself can insure that the study will ultimately be worth its cost by virtue of its contribution to the community's efforts in planning, fund-raising, and service provision.

In this paper we present guidelines to help a sponsoring organization effectively utilize the study in which it has heavily invested. We emphasize avoiding the most common pitfalls which have ensnared federations that have undertaken population studies. We also point to several positive steps that communities have taken to enhance significantly the extent and quality of research utilization. Our purpose is to provide a step-by-step guide for the federation that wants not only to conduct, but to use, a population study in the most effective manner.

FEDERATIONS AND PLANNING

The development of federations into what Daniel Elazar calls the "framing institutions" of the American Jewish polity has been tied to their growing activity and sophistication as planning instruments for the American Jewish community. The initial impulse for the creation of federations was the perceived need not only for more effective fund-raising, but for improving and coordinating services being offered by the charitable agencies of the day. As early as the second decade of this century, Jewish social service workers and organizations were advocating systematic demographic and social research as a vital component of a program of communal planning. In the 1920s, the Bureau of Jewish Social Research (a forerunner of the Council of Jewish Federations) conducted or helped spur communal surveys in New York, Chicago, Cleveland, Boston, Washington, D.C., and a number of other communities, large and small. The post-World War II period saw a new wave of population studies, as federation planning became institutionalized in nearly every community of moderate or larger size.

At least four different types of activities can be placed under the rubric of the federation planning function:

1. Campaign planning: Identifying population segments to be targeted for fund-raising efforts and projecting approaches likely to be effective.
2. Budgeting and allocations: Deciding how the resources available over a given period of time should be allocated among various agencies and programs.
3. Service and program planning: Determining the need for services and programs in the community and assessing the adequacy of current endeavors in these areas.
4. Strategic or long-range planning: Identifying trends in the environment, client population, and organization system that are likely to affect long-term service and program needs, and developing strategic objectives and priorities to guide program and service planning activities.

The information developed in a Jewish population study can be of value to each of these types of planning. However, a population study is not equally useful to all, and the additional information needed for effective planning of each type will vary.

The term "population study" can refer to a variety of surveys differing dramatically in both scope and content. The choice as to what should be included in a population study should be made in light of its intended use. Almost all population studies provide data about the size, composition, and characteristics of the population in a community. A population study can also be useful as part of "needs assessment." For this purpose, however, the study should include appropriate questions beyond those usually associated with pure demographic data. Similarly, a population study can be a tool in campaign planning, provided it is structured appropriately from the outset. In general, population studies will have minimal relevance to immediate budgetary decisions, though the information produced may help to guide long-term shifts in allocations via changes in priorities and identified needs.

In any given instance, the value of a population study for planning purposes will depend on both the context in which it is to be used and the other sources of information currently or prospectively available. Some studies are improperly matched to their context: they fail to reach the right population, or fail to ask the right questions; or they cannot be integrated with existing data. Obviously such studies have greatly reduced value, even though they might be technically sound, and perhaps even useful in other planning contexts. Likewise, other sources of data, either currently or potentially available, may be more valuable and appropriate than population studies for some planning tasks. Since planning is, in addition, always a process involving more than simply assembling and analyzing information--values and political considerations must be factored in as well--the value of a population study will depend on a variety of factors other than its intrinsic merit. Thus the community undertaking or contemplating a population study must always be alert to the ways in which it will want to use the data, and the total context within which it will be utilized, even before the process is initiated.

ALTERNATIVE AND SUPPLEMENTAL DATA SOURCES

Several other sources of data, most of which are low-cost or virtually free, are readily available. These data sources can tell us either about the local Jewish population or about the areas in which Jews live. They can provide valuable information to supplement the population study and, for some purposes, can even totally obviate the need for a costly large-scale Jewish population study.

For example, by using death records available from official sources or funeral homes, researchers can readily establish the size, age structure, residential patterns, and illnesses typifying the local Jewish elderly population (see Ira Rosenwaik's article in this volume). Moreover, these types of information can be similarly derived for the local non-Jewish population, allowing one to determine distinctive characteristics of the Jewish elderly.

Real estate agents and analyses of recent home buyers and sellers from public records of real estate transactions can be useful in identifying new or declining areas of Jewish settlement and in estimating the influx or outflow of Jewish migrants.

Electric and gas utilities maintain detailed and updated information on population movement so as to better plan their facilities. While they will not make their customer records available, their analyses of internal migration trends when coupled with information on neighborhood characteristics can be useful in forecasting Jewish population movement as well.

Telephone directories readily provide reasonably accurate information on the distribution of the local Jewish population, even though by themselves they can offer only limited information as to the size of the population. Clerks can note the distribution of listings with Distinctive Jewish Names (DJNs) classifying them by address or neighborhood. These records may be compiled year by year so as to provide an ongoing indication of the shifting patterns of settlement. The A. B. Data Corporation of Milwaukee regularly applies an ethnication program to a national sample of 55 million telephone listings. The program identifies roughly 40 percent of Jewish households and --due to intermarriage, name-changing, and other historic reasons--includes a small percentage of non-Jews with Jewish names as well. As a result, for each zip code in the country, A. B. Data maintains an annual count of listed DJN households, which can be used as an index of local Jewish population distribution. Comparisons of changes in the index over several years can give a fairly reliable picture of Jewish population movement.

Information on standard sociodemographic characteristics of the Jewish population and its size is often obtainable from local electoral surveys and market research studies. News organizations and academic institutions frequently conduct surveys of the general population and of the electorate. Although the number of Jews in any one study may be too small for reliable analysis, the results of several such studies may be merged to provide a reasonably accurate portrait of local Jewish population characteristics.

Analyses of agency records of client populations can tell much about the changing social service needs of the local Jewish population and the social characteristics of the client populations. The scope and quality of records maintained by service agencies vary dramatically from agency to agency and community to community. The usefulness of these records could be greatly enhanced if every family agency, summer camp, Jewish community center,

school, synagogue, or other institution used a standardized form which would supply data to a central data entry and retrieval facility.

Finally, the large amount of data regularly collected by various government agencies and typically assembled at the local planning commission or other such body can be extremely useful in constructing a picture of the residential areas where Jews live. In addition to the U.S. Census, other sources of data include police statistics, school enrollments (size, racial composition), school performance (e.g., achievement tests), housing statistics (building type, ownership, code violations, sales prices), sanitation data (evaluations of street cleanliness), park and recreational evaluations, and a welter of health statistics.

The quality and usefulness of available data will vary by community and by the local research needs. Nevertheless, alternative data sources may dramatically enhance the understanding of population study data, and, in some instances, they may make unnecessary the high-cost conventional Jewish population study using a sample survey design.

ALTERNATIVE AND SUPPLEMENTAL RESEARCH

Ideally, the data from the population study should be interpreted in conjunction with research from other relevant sources. We may divide such research into three areas: other local Jewish population studies, other Jewish social research, and social science research generally. All can offer useful insights and provide crucial background information to the Jewish population study. We may note illustrations from each area.

From other local Jewish population studies we learn that Jewish institutional affiliation rates (synagogue membership, organizational belonging, campaign contributions) vary dramatically from one community to another (see the compendium of studies prepared by Gary A. Tobin and Julie A. Lipsman, elsewhere in this volume). In particular, as professional practitioners well understand, smaller, stable communities tend to have much higher affiliation rates than larger or more residentially mobile areas. This instance is but one example illustrating the need to interpret population study data in the larger context of recent American (if not international) Jewish population research.

From the larger field of Jewish social research we learn several lessons, which can help frame both the design and the interpretation of a local Jewish population study. For example, we have learned that, contrary to recent speculation that many American Jews were translating their discomfort with particular policies of the Likud government into distancing from Israel, recent public opinion surveys show that the familial, personal, and spiritual connections between American Jewry and Israel have remained firm and unshaken, even as some American Jews have become more overtly critical of the Likud and its policies. Such information is useful not only for campaign planning, but also for Jewish educators and those concerned with local programming around Israel.

From general social science research we can cite evidence of drops in institutional affiliation and participation of all sorts in the three to five years following a residential move. Afterwards, participation in formal local institutions (such as houses of worship) recovers to previous or expected levels. The lesson for communal planners is to understand that areas of recent Jewish migration "should" have low rates of affiliation for several years, at least until such time as informal networks emerge

and the community can be mobilized to create and participate in Jewish institutions.

Obviously, these examples by no means exhaust the type of information and interpretation that can be gleaned from years of research experience in cognate fields. However, they should serve to demonstrate the usefulness of having a command of allied research and of applying the lessons from that research to the interpretation of local Jewish population studies.

COMMUNITY PREPARATION: INVOLVING FEDERATION, THE AGENCIES, AND LOCAL JEWRY

If a population study is to be used effectively, the groundwork must be laid well in advance of the decision to undertake the study. As the article in this section by Tobin notes, the key elements in the community must be given a vested interest in the study and in its use. The St. Louis experience is a model of how lay and professional leaders in the Jewish community were involved in the following activities:

1. Reaching a consensus that a study was needed.
2. Appreciating the value of a study for the community and its various organizations.
3. Providing input into the research agenda.

All three elements are essential in community preparation. The process itself must operate at several different levels. The first is within the federation--i.e., winning the consent, understanding, and input of federation staff and lay leadership. The decision to undertake a population study should have the broadest possible base of support within the organization. Even those who will not be directly involved in carrying out, supervising, or using the research should be made to feel comfortable with the decision to proceed and should understand the value of the enterprise within the framework of the federation's mission and needs. Failure to secure this support can have several adverse effects:

1. In the worst case, opponents may try to sabotage the study process.
2. Lack of support or understanding at the outset may be translated into lack of willingness to accept (and implement) the results and conclusions of the study. Subsequent decisions in the federation based on the study results will likely require the support of individuals not intimately involved in the study process. If they have been totally excluded from initial decision-making and educational efforts, such support is less likely to be forthcoming.
3. The more federation leaders and staff are involved at the outset, the more likely it is that unanticipated contributions to the study process and unanticipated uses for the information produced will emerge.

The second level of community preparation goes beyond the federation to involve its agencies and other important Jewish organizations. Here again, the rationale for explicit efforts to secure support and input is straightforward: such support and input enhance the likelihood that the

study will ask useful questions, and that its results will be accepted and utilized. The same considerations (though with somewhat less immediacy) apply at the final level of preparation as well, that of the Jewish community at large. Here explicit input is less significant, but a willingness on the part of those surveyed to participate is obviously critical.

There is no single correct way to prepare the community for a population study. The methods chosen will depend on several factors: the size of the community; its history and organizational structure; the level of awareness and climate of opinion already existing. Federation processes emphasize consensus-building around every major decision. A broadly representative committee with a strong chair and a senior-level staff member conducting the initial information gathering and transmission will promote acceptance of the project. The committee may be the planning committee itself, or a special subcommittee appointed for the purpose of ascertaining the need for the study and initiating the process.

Depending on the communal environment, federation agencies and other Jewish organizations may be involved at this stage through either formal or informal mechanisms. Personal or telephone consultations with important professionals and lay leaders will often suffice at this point. If more formal approaches seem called for, these may involve a series of meetings between the initiating committee and interested parties, or a questionnaire soliciting views on the proposed study. Whatever the mechanism, the process of preparation at this level is really a combination of "selling" the study concept and securing genuine input into its shape and scope before these are fixed.

For the community at large, direct communication through the Jewish (and general) media can be supplemented by indirect dissemination of information through the organizations and leaders reached directly by the federation.

An important caveat throughout this process of community preparation is to avoid "overselling" the study. Raising unrealistic expectations can complicate the task of interpreting and utilizing the results at later stages. And one should never overlook the possibility that a study simply may not be warranted, either because the need cannot be established or because key actors in the community are unwilling to cooperate.

DETERMINING THE RESEARCH PURPOSE

What can be taken from a study depends on what is put into it. In the simplest terms, no use can be made of data that are never gathered. Thus, in addition to preparing the community to support a population study, the sponsoring organization must, even before a consultant is engaged, determine what it wishes to learn through the study. The range of information which can be gathered is enormous, and the constraints of time and budgetary limitations require that some overall objectives be established for the study at the outset. The task of the study director is to translate these objectives into appropriate questions and, eventually, answers. But the consultant must know what information the community seeks before he or she can frame an approach for getting it.

A federation conducting a population study should be guided by several factors in determining the purposes of the research, including:

1. The state of knowledge already available to it. While there is no point in seeking information about that which one already

knows, acquiring reliable data to confirm or disconfirm what is suspected can be a very legitimate research aim.

2. The uses to which the results of the study will be put. A study designed to support a community-wide strategic planning process will seek information about a much broader range of issues than one which will be used only to guide planning for services to the elderly or to guide the decision whether to build a new facility.
3. The mechanisms and resources available to process the results. Gathering more information than can be effectively used by the consumers of the study data--primarily the federation itself--wastes resources that might more effectively be utilized elsewhere, including in the interpretation of the data.

A federation undertaking a population study should rank its priorities among the major areas in which it would like information. Typically, such lists will include a common core of areas of concern:

1. Population size and distribution.
2. Population characteristics in terms of a number of demographic and socioeconomic variables such as age, household structure, generation, residential history, education, occupation, and income.
3. Jewish identification and affiliation--synagogue membership, denominational preference, ritual observance, philanthropic activity, and Jewish education.

Population studies will also typically be undertaken for other purposes reflecting more idiosyncratic concerns as well. Examples include a desire to gather information about service utilization, or attitudes toward community issues or institutions, or special-needs populations. Such purposes are myriad and diverse. The primary rule in seeking special information is to seek that which is most likely to be used by someone. Much valuable specific information can be "piggy-backed" onto a planned omnibus population study. This should not, however, be done at the expense of more basic data which can feed into many planning contexts. As an example, recent studies in two intermediate cities incorporated extensive research on the elderly and singles, but lacked all but the most rudimentary information on Jewish identification for the population as a whole.

In defining what it wishes to know, the federation should be aware of what other communities have sought to study. Having access to comparative data can be of considerable value in many instances in interpreting local findings.

The process of determining research purposes provides an opportunity for building the base of institutional and communal support and understanding for the study spoken of above. By this point in the overall study process, if not sooner, a special study committee should be appointed and functioning. The committee will have responsibility for overseeing the entire process, and working closely with the study director. Ideally, its membership should include both individuals well situated politically within the organization and community, and persons with some degree of expertise in the social research field. (Too much expertise can sometimes be a problem. One federation found that its committee had so much expertise that it was meeting long into the night reviewing every aspect of the study process.)

The primary responsibility for determining the research purposes of the study should rest with the study committee. Others in the federation and the community, however, can and should be consulted. By inviting input into the process of choosing areas of information to be sought, the sponsor gives those responding a stake in the study. Input from a wide range of sources is valuable at this stage, as long as it is made clear (a) that not everything can be asked, and (b) that the final form in which questions will be posed will be determined by those carrying out the study.

After receiving input from several sources, those charged with setting the research agenda will need to decide among competing research priorities. Their task will be considerably eased if they take the time to think through the specific, detailed information they will ultimately need. Ideally, they will undertake the following steps:

1. Delineate a set of policy questions or issues facing the community. (Example: Is a particular service population large enough to warrant special services? If so, how do we best serve that population?)
2. Specify the information and the level of precision that will be needed to inform the policy formulation process. (Example: We need to know the size of the service population within 10,000; or we need an estimate of the extent to which it belongs to synagogues within a certain percentage.)
3. Define the particular measures or questions that will supply the requisite information. If possible, try to imagine the actual tables that will be run so as to make sure that particular items are included in the questionnaire. (Example: If the respondent or spouse is "Israeli," the birthplace of either or both is relevant to a definition of that term, as is the year of immigration to the U.S.; and the questionnaire should make provision for Israelis who are not native to Israel but lived there for a considerable period of time before coming to the U.S.)

The research committee should, ideally, carry this process as far forward as it can on its own; but, at some point, it will need to obtain the advice of the research consultant with survey research skills. Clearly, the criteria for and process of selection of that consultant are crucial to the successful conduct of the population study.

CHOOSING A CONSULTANT

In addition to the usual criteria by which one engages professional staff, federations will need to consider several criteria peculiar to the research consultant for the local Jewish population study. These include the following:

1. The consultant should be experienced in several aspects of survey research: questionnaire design, quantitative data analysis, and the nontechnical interpretation of research findings through lucid writing and provocative oral presentation.
2. Some aspects of the design and execution of the study can be "farmed out" to subcontractors or benefit from specialists in several areas. Many communities have used consultants who in turn contracted with a local survey or market research firm to conduct

the interviews. The firm administers the questionnaire to the specified sample and provides the researcher with a clean data tape for analysis. Some research consultants have worked with specialists in sampling, questionnaire design, and Jewish population research to provide supplementary expertise in highly technical areas.

3. Ideally, the researcher should have command of the literature in Jewish social research and should also bring to bear skills from a broader discipline such as demography, economics, sociology, or political science. Studies conducted by market researchers or those with little previous experience in Jewish social research or the conduct of Jewish population studies tend to betray a lack of sensitivity to issues important to the Jewish community and the study of Jewish identity.
4. The consultant need not be indigenous to the community. The use of locally based researchers is, of course, advantageous in at least two respects: they are available for consultation in person, and are likely to be familiar with local conditions. However, our sense is that experienced and otherwise capable "outsiders" can usually overcome the drawbacks of not being indigenous. Thus, the criterion of local residence for the consultant represents a desirable but

BUDGETING FOR INTERPRETATION AND ANALYSIS

While there are several issues that could be addressed in a discussion of budgeting for a local Jewish population study, we wish to discuss only one particularly troublesome aspect of the process. Quite obviously, a budget should be properly balanced over different phases of the population study. Our impression is that until recently, many communities budgeted adequately, if not more than adequately, for data collection, but they drastically underbudgeted for subsequent data analysis and interpretation. Thus, the quality of the sampling and the data tapes was unimpeachable; but researchers were given little opportunity to analyze the data and to interpret the findings to key lay and professional groups. Instead, they could produce only population estimates and rudimentary cross-tabulations.

We suggest that if, as is usual, a community can afford a limited budget for research purposes, that it allocate adequate resources for analysis and interpretation even if such a step makes for less than ideal (but still adequate) data collection. Generally, data collection costs are huge and analysis and interpretation expenses are rather modest. Most increases in the budget for analysis and interpretation can usually result in a significantly more extensive and sophisticated research product.

ACTIVATING THE PLANNING PROCESS

Perhaps the single most important key to making successful use of a Jewish population study is activating the planning process in advance of the study itself. As we have demonstrated, it is important to conduct a population study in the context of the larger framework of federation activity, rather than in isolation. This means insuring that the connection between regular social planning activities and the study should be established well

before the results are in. That is, the planning/budgeting/allocations committee should be thinking about how the data developed by the study can inform their work as soon as the idea of the study is broached.

These considerations have even stronger force with respect to long-range and campaign planning, where many federations do not maintain permanent structures. The long-range planning committee, which will often be the critical bridge between the study and the federation's programmatic activities, should be operating (even if only in a preliminary fashion) before the study process is fully under way.

A "user education program" to train key staff and leaders in how to make the best use of the study results should not wait until the study is completed. The basic guidelines throughout the study process should be one of holistic planning and anticipation. Although the process will move through distinct stages, each stage must be organized with the eventual end result in mind, and the process as a whole must be integrated as fully as possible into the ongoing work of the federation.

THE OVERALL STUDY REPORT AND BEYOND

A cursory examination of some of the more sophisticated and extensive local population studies reveals a certain uniformity in the topics covered in such reports (see, for example, Gary A. Tobin and Julie A. Lipsman's compendium). The basic report typically includes population estimates (for the entire study area and regions within it); age distributions, household structure and living arrangements, marital status and history; socio-economic status (education, employment status, occupation, income); residential characteristics (ownership, dwelling type, migration history, migration plans, neighborhood evaluation); Jewish identification (ritual practice, communal affiliation, campaign and other philanthropic participation); and community service utilization (or needs assessment).

Most federations choose to issue for public distribution a single document summarizing the essential research findings. The report, often replete with graphs and large type, usually serves two useful functions. First, it provides the public with the sense that the federation is the central source of information on the Jewish population in its region. Such a function reinforces the image of the federation as the central framing institution of the Jewish community. Second, the basic report serves the information needs of many Jewish communal institutions.

But ideally, the population study should go beyond the information typically presented in the basic report. The most effectively used studies supply two other sorts of information. First, they can be used to establish an on-line system to provide specific pieces of information to agencies and other users of the study. The agency serving college youth, for example, may need projections of the size of the Jewish college youth population in the next ten years. The unit concerned with planning day care may need to know the number and characteristics of working mothers with preschool children. The agency for the aged may need to know areas where the elderly population is expanding or contracting.

This type of specific information can be provided by a computer programmer with specialized conceptual skills. He or she must be both familiar with the data set and capable of helping professional staff translate their often ambiguously phrased requests for information into

specific inquiries. As an example, the unit planning day care facilities may know enough to ask, "How many families need day care?" The programmer may need to help the unit specify its request to arrive at a data-oriented portrait of such families (i.e., those where a mother works at least part-time outside the home and where there is at least one child six years old or under).

In addition to specific requests for data and the basic report, the population study can generate several in-depth topical reports. In the past, federations have requested reports on such topics as campaign planning, the aged, recent immigrants, the impoverished or economically vulnerable, and other service populations; the impact of Jewish education or the intergenerational transmission of Jewish identity; or the patterns and determinants of fertility, divorce, intermarriage, and other demographic phenomena. Once the data are collected, the costs of analyzing and interpreting them are relatively minor.

Communities have utilized the population study data in three major ways: issuing the basic report for the public, supplying answers to specific data requests by agencies and others, and preparing in-depth specialized reports. To the best of our knowledge, few if any communities have utilized the population study data to the fullest extent possible. In part this situation derives from lack of experience of both researchers and clients (federation professional and lay leaders) working together on these studies, and in part it derives from a failure to budget adequately for analysis and interpretation following collection of the data.

The Style of the Report

The utility of the overall study report depends not only on its contents, but also on its style. Lay leaders, and even many professional staff, usually have little experience in reading social research reports. Even sophisticated and intelligent individuals cannot be expected to feel comfortable looking at complex tables or arrays of statistics. On the other hand, they do not want to be presented simply with a set of conclusions without supporting data that they can assess independently.

One way of easing the burden on the report writer is to provide some form of advance training for those who will be receiving the study report. Such skills as reading tables and understanding various statistical measures can be reviewed. Having the study consultant (or other qualified individual) review the report orally, giving special attention to interpreting charts and statistical data, can be similarly helpful. Nevertheless, it is not reasonable to expect that all readers of the report will undergo such training, or that those who do will be able to grapple with regressions, tests of significance, and factor analyses.

This means that the study report must provide enough data to anchor the narrative in numbers, while presenting those data in a form intelligible to the average reader. There are a few relatively simple ways of enhancing readability without sacrificing content:

1. The narrative itself should be clear and simple, without too many numbers embedded in the text. Readers should be able to get the gist of a finding from the narrative, and then be referred to an accompanying chart or table which presents the data in numerical detail.

2. Such charts and tables should be placed as close as possible in the report to the narrative referring to them, so as to minimize the need to jump back and forth.
3. Tables should be clearly labeled. Interpreting cross-tabulation tables can be confusing. Do the numbers shown indicate the percentage of Jews between 18 and 39 years of age who are Orthodox, or the percentage of those who are Orthodox who are between 18 and 39 years of age? The table caption should indicate how the numbers are to be read.
4. Wherever possible, supplement both narrative and numerical tables with bar and circle graphs, maps, and the like. Not only do these graphic presentations make the report more interesting visually and help retain the reader's attention, but they often are the clearest way of presenting data and make it easier for those with numerophobia to understand the findings.
5. Avoid esoteric statistics and statistical procedures. Unless they help make a truly vital point which otherwise would be lost, operations such as regression and factor analyses, and statistics such as correlation coefficients, betas, and levels of significance do not usually belong in the general-consumption study report. A clear statement regarding issues affecting the reliability and validity of data reported should be made at the outset of the report, but except where an adequate number of cases makes a particular finding questionable, the caveats should not be belabored, especially in statistical terms.

An Executive Summary

Not everyone who should be informed of the major findings of the population study needs to receive a copy of the overall study report. Many can make use of an executive summary, which in succinct fashion pulls together the most significant findings, without all of the supporting detail. Not only can the executive summary (a five to ten page document) save printing costs, but it may also induce some who would simply put aside a longer report to read through the major results. In addition, preparing an executive summary gives the federation an opportunity to highlight the areas it believes are most important and to make sure (insofar as this is possible) that these receive adequate attention in the consumer constituencies.

The summary can be a strictly factual document--just reporting findings--or an interpretive one as well. After each set of findings, a section can be included which might be entitled "implications for the community" or "issues for planning." Linking these directly to the major findings of the study establishes a crucial nexus between data and potential utilization. This can provide a further impetus toward insuring that the study findings are in fact used by the appropriate committees and organizations. Naturally, the power to interpret is the power to guide, if not to control, the process of utilization. Thus, those writing the executive summary (who should normally be professional staff of the federation, not the consultant) must be careful to be both fair and accurate in suggesting implications and possible conclusions from the data.

The great virtue of an executive summary lies in its brevity and directness. The results selected for inclusion should be those most sig-

nificant for planning purposes (with just enough general data to give a sense of the "big picture"). What should be highlighted are trends, findings that suggest a need for action, and data directly related to institutional performance. Attempting to report everything will only vitiate the summary's impact. Stylistically, the executive summary should be "punchy," using underlining, boxing, capitalization, and other devices to make key findings and conclusions stand out. The executive summary should receive wide distribution. Next to the release of information to the media, it provides the federation with its best means of reaching many people and influencing their perception of the study's results and their significance.

INTEGRATING POPULATION STUDIES WITH OTHER DATA SOURCES

As noted earlier, population studies constitute only one of the available sources of data for planners in the Jewish community. In most instances, sound planning requires different types of information, and more of it, than population studies alone can provide. To make the most effective use of the information arising from population studies, one must place it alongside that generated by other sources--needs assessments, service records, program evaluations. A population study can help planners make a reliable estimate of the number of elderly in a community, of their income, and of their living arrangements. If designed to do so, it can also provide indications of how many are receiving various community services and of their perceived service needs. A population study cannot provide an objective assessment of the adequacy of those services, of the cost-effectiveness of various ways of meeting identified needs, or of the alternative organizational arrangements which might be made to provide services. Both types of information are critical for federation planning.

The data from population studies must, therefore, be viewed as only one resource for community planners, but not as a substitute for other types of information. Its value will be enhanced to the extent that it can be integrated with these other data sources.

Maximizing the potential for integration of information from diverse data sources begins when the study is being designed and the survey instrument written. But realizing that potential requires that those who are using the population study be attentive to and creative in extending its "fit" with other data. Focusing on the study alone can result in an unnecessary narrowing of perspective, and a resultant frustration when the study fails to provide the answers to important planning questions. The concept of an integrated management information system, in which the basic demographic and social data provided by the study can be flexibly linked up to other information to provide a total picture of a population segment, its characteristics, needs, and current relationship to communal institutions and programs, is an ideal toward which federation planning structures should be striving.

THE ROLE OF POPULATION STUDIES IN DECISION-MAKING

It follows from this discussion that population studies can play a role in, but do not in themselves dictate, important federation or communal decisions. To invest in a population study and not to utilize its results in informing communal decisions is, to say the least, uneconomical. But it

is also unrealistic, as we have emphasized on several occasions, to believe that demographic or even attitudinal data can constitute the only factor in communal decision-making.

Assuming that the study is competently done, the real question is one of how data interact with the many other elements that go into decision-making--notably considerations of values and power relationships--to produce a final outcome. The fact that a new center of Jewish population has emerged within a metropolitan area can be demonstrated by a population study. Whether that population concentration warrants construction of a new community center facility in the area is a question of a different order. Sometimes by pulling together information from the study--by showing that the population exists, that it is underserved, that it has the potential to contribute more than its share to the community--one can construct a powerful case on behalf of one policy option (in this case, perhaps, building a center). But many other factors, about which a population study will say little or nothing--e.g., the existence of unused capacity in area synagogues, more pressing needs for increasing the salaries of Jewish educators, political tensions within the community--may suggest a very different decision. In sum, objective information about population characteristics can be a tremendous boon to responsible decision-making. However, "facts" do not in and of themselves make such decisions. People do--people equipped with facts, but also with values and political interests. What data from a population study can do is help insure that those who have strong values and interests cannot substitute mere assumptions for solid information as they engage in the decision-making process. And at times, the facts revealed in a study may be so dramatic--a high rate of intermarriage, the existence of large numbers of elderly living at or below subsistence levels--that a lethargic leadership and/or community can be stimulated to take action where otherwise no decisions at all would be made.

USING POPULATION STUDIES TO FOCUS FURTHER RESEARCH

Even with the best of intentions and the most careful planning, population studies may not tell a federation all that it needs or wants to know about a particular topic. This may be due to the inherent limitations in such studies, to inadequacies in budget and/or manpower, or to unexpected findings which demand expansion and clarification.

If a federation views a population study as a one-shot venture, these knowledge gaps may be a source of considerable frustration, sometimes even recriminations. If the federation, on the other hand, sees a population study as one aspect of an ongoing social research program, this liability may be turned into a virtue. In this instance, one deliberate use made of the study is precisely to suggest areas where further research may be called for. Sometimes, if this need is anticipated, the additional studies--of particular population segments, or particular issues--can be linked to the general population study. A portion of the sample may be reinterviewed more intensively, or invited to participate in other forums for ascertaining community attitudes or evaluating services and programs. A segment of the sample can become the subjects for a longitudinal study as a panel to be periodically reinterviewed.

At times, however, the need for additional research--or the area to be studied--may not be anticipated at the outset of the population study process. In such instances, part of the analysis and reporting--usually

with the aid of the consultant--should involve identification of subjects for further investigation. If, for example, the population study reveals a concentration of unaffiliated Jews of whom the federation was not previously aware, that may indicate the need for intensive interviewing among that group. The key lies in accepting the fact that no single study can be expected to answer all questions, and that heuristic use may be as important as any other type of utilization for the study results. This demands, of course, that the federation be committed to the concept of research as an ongoing aspect of its planning work, perhaps even to the point, as many larger federations have done, of engaging professional staff specifically for that purpose.

The population study can also be used to establish a system for interpreting available social indicators so as to answer questions planners may have in future years without need to resort to the expense of a new population study. For example, researchers may be asked to investigate the adequacy of triangulating information from the census, local electoral studies, and lists of Distinctive Jewish Names to get a handle on the size, location, and characteristics of the Jewish population. Such information can be used to trace Jewish population movement by annually inspecting telephone directories and analyzing information from publicly available sources.

The experience of the 1965 and 1975 Boston Jewish community studies demonstrates the value of collecting parallel information on the same community ten years apart. As an illustration, side-by-side analyses of the Boston studies, for example, indicated that Jewish commitment had emerged as a powerful predictor of whether one contributed to the campaign in the ten-year period, thereby implying that the federation had a vital stake in nurturing the Jewish commitment of Boston Jewry. Other analyses showed there had been a huge increase in the number of "alternative" households (singles, childless couples, intermarrieds, and the divorced) and that these households had become even more remote from Jewish life than they had been earlier. This finding suggested that the community should expand its efforts to attract "alternative" households to communal institutions and activities. In short, the comparison of studies of the same community ten years apart offers the opportunity to detect dynamic trends and thereby formulate more sophisticated social policy. (For further discussion of methods of updating population studies, see Bruce A. Phillips's "Exploring Possibilities for Followup Studies" in this volume.)

Clearly, every community will develop its own approach to population research suited to its needs and capabilities. We have offered the guidelines above as a way of sharing our collective experience in this still young and developing field of research. Undoubtedly, the thinking of those in the field will be refined and modified as we continue to gather more experience in the conduct and utilization of Jewish population research.