

Exploring Possibilities for Followup Studies of Jewish Communal Surveys

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Allocation of funds and long-range planning are two separate (and sometimes independent) aspects of federation planning. Although a Jewish population study provides data for both, it is better suited to allocations because of its cross-sectional ("one-shot" survey) design. It can estimate the size of and collect information about key planning populations (such as single parents or the elderly); and, in general, it provides information about specific populations currently served as well as the community as a whole at the time of the survey. Because it does not collect information about change, it is less useful for long-range planning. Since the scope of federation planning has largely been short-range, this has not been a problem so far. As federation planning moves more toward a long-range perspective, information about population dynamics will take on greater importance.

Surveys can measure change in two ways: through retrospective questions about prior change and through prospective questions about future behavior. Retrospective questions ask about past marriages, previous moves, prior synagogue membership, and other changes that the respondent or the family has experienced. Prospective questions concern intentions and expectations about such things as moving, having more children, or enrolling youngsters in a religious school.

Both sorts of questions have their limitations. Retrospective questions can help us understand the scope and effect of social change that has already occurred, but they cannot predict it. Prospective questions are limited to what people say they will do, which is not necessarily what they will do in fact. Cross-sectional studies are limited in other ways. For example, Sunbelt communities are affected by growth, but Jews planning to move there can be studied only in the communities they are planning to leave.

Longitudinal studies, because they are repeated over time, do not have these limitations. There are but a few examples of longitudinal Jewish research, and only one was actually designed to be longitudinal. In 1975 Floyd Fowler replicated the Boston study conducted ten years earlier. The sample design and question wording of the 1975 study were constructed so as to insure comparability with the 1965 study. The focus of the discussion in the 1975 report is on the changes that had taken place during the previous decade. The series of cross-sectional studies conducted in Los Angeles by Fred Massarik in 1951, 1959, and 1968 (and supplemented by the author in 1979) were not primarily intended to be longitudinal. Taken together,

however, they dramatically demonstrate the overall growth of Jewish population, the move to the suburbs, increases in divorce and intermarriage, and changes in the structure of the Jewish family. Peter Friedman, who directed the 1981 Chicago study, is using the 1972 Chicago sample of the National Jewish Population Study as baseline data for comparison, taking into account differences in sample and questionnaire design.

One reason for the limited number of longitudinal studies is the cost of repeating a large-scale community survey. An economical alternative to the replication study is a followup study. A followup study may use the respondents from the original sample in a second study or it may use information from the original study to locate new respondents.

Followup studies should not be considered a substitute for serious longitudinal research. Rather, they are a step toward such research. A good followup study can create a greater interest in full replication studies by demonstrating the possibilities for social change research. This paper explores three possible models for followup studies along with examples of planning questions that they can address.

PANEL STUDIES

Respondents in a panel study are interviewed two or more times over a period of time. Using the original sample in a Jewish community survey as a panel has economic as well as scientific advantages. Once the sample has been drawn and the background data collected in the first interview, the followup interview costs only as much as the new data collected. The overhead, so to speak, has been greatly reduced. More important than its relatively lower cost, the panel study can be used to test predictive questions, measure life cycle changes, and to go into greater depth in specific areas. (See Hans Zeisel, Say it with Figures [New York: Harper and Row, 1957], pp. 215-219.)

Testing Predictability

Three examples of predictive questions have already been cited: plans to move, plans to have children, and plans to give children a Jewish education. These questions have potential bias in that respondents might prefer to give what they perceive to be the "socially desirable" answer. For example, parents might tend to answer that they plan to enroll their children in a religious school when, in fact, they do not. Contacting the same respondents two to five years later would evaluate the predictive validity of these questions by finding out how many people who said they would move (or have children or send them to religious school) actually did so, and, conversely, how many who said they would not actually did, despite their announced expectations or intentions. Comparing the intended with the actual behavior could be used to estimate the degree of predictive validity for these and similar questions about future behavior. This refinement would add to the planning utility of these types of questions in future studies. The value of this model for followup studies goes beyond the refinement of predictive questions. Asking people why they did what they did and analyzing differences between true and false predictions helps us understand why some families follow through with their stated intentions while others do not.

Changes in the Life Cycle

Differences among age groups in cross-sectional studies can be attributed either to a maturation process or to different historical contexts of socialization. Age (or life cycle) effects means, for example, that the twenty-five-year-old in the sample who is not now married will probably be married ten years from now, and will probably act and think differently then as a result. The presence of cohort effects, on the other hand, would mean that today's twenty-five-year-old is deeply influenced by when he or she was born and lived, and will not be expected to act or think, ten years from now, like the thirty-five-year-old of today. The ten-year difference in age also includes ten years of potential social change. The only way to disentangle cohort from age effects is to study the cohorts over time. An understanding of cohort effects is the first step to a better anticipation of long-range social change.

A variety of changes are already known to occur throughout the family and life cycles. The following questions might be addressed by a panel study of the original respondents conducted five years later:

1. What proportion of the singles have married or remarried? Have they married Jews or non-Jews?
2. Conversely, what proportion of the current marriages have dissolved?
3. How many women have left or reentered the labor force? At what age? How old were their children (if any) at the time?
4. What sorts of changes in affiliation take place when children are born, and what sorts occur when grown children leave the household?
5. What changes in affiliation and Jewish giving occur as the respondents progress in their careers?
6. What proportion of the elderly are no longer living in the community?

Investigating Specific Issues in Greater Depth

At the conclusion of a study it is not uncommon for researchers to discover that a key question was not included or that some of the findings raise other questions. Similarly, some area has not been explored because of time limitations and cost considerations. These frustrations can be addressed by a panel study because it allows the researcher to ask additional questions of the original respondents. The recently completed Denver study, for example, has raised further questions. As a case in point, Denver has an intermarriage rate higher than any community studied to date. Both parties in an intermarriage were more likely to have been born outside of Denver than the parties in an in-marriage. It appeared that the intermarriages in Denver may have taken place outside of the community, suggesting that intermarrieds were moving to Denver to get away from their home communities. A followup study could include a question on where the couple was married as well as other questions for intermarrieds. The intermarrieds were also found to have lower fertility than in-marrieds of the same age. The opportunity to talk to both sets of respondents again would make it possible to explore some of the reasons why.

Followup studies could be especially valuable to social researchers with a special interest in American Jewry. Since Jewish community surveys are designed as planning tools, more basic research areas such as Jewish identity tend to be neglected. A second study using the original sample could provide scholars with an opportunity to explore the kinds of substantive areas usually excluded from community surveys because sponsors see them as more "basic" than "applied."

AUGMENTED SAMPLES

One sure complication in a panel study are dropouts from the sample. At least some proportion of the households can be expected to have moved by the time the original sample is contacted for a second time. In addition, households that have moved into the community since the study was completed would not have been part of the original sample. While it may be possible to trace dropout households still in the community if they have left a new phone number or if other identifying information such as name and address is available, the followup researcher needs to consider ways to augment the original sample. There are two reasons to augment a sample: to add to or replace dropout cases of special populations, and to find out about changes that have taken place since the original study. In both cases the original sample is augmented by drawing a smaller second sample from the same strata as in the original sample frame. In a list sample the lists are the strata. In a Random Digit Dialing (RDD) screening sample the prefixes are the strata. (The differences between list and screening samples are explained in depth in "Sampling Strategies in Jewish Community Surveys" in this volume.)

How the sample is augmented depends on the purpose of the augmentation. If the intent is to replace dropout cases, or to add to the size of the subsamples (such as intermarrieds, single parents, the elderly, Jews in new areas), then the second sampling should include only those strata from which the dropout respondents originally came. If the purpose is to update the original study by observing changes that have taken place in the community, then a smaller version of the entire original sample should be drawn. To augment a list sample, the original lists should be updated. An RDD screening sample can be augmented simply by drawing a new sample stratified in the same way as the original. A better approach is to use the information gained in the first study to draw a more efficient and therefore less expensive second sample. This can be accomplished by eliminating all prefixes where no Jewish households were located and reducing the size of the sample from those where Jewish households were scarce.

COMBINING STUDIES

As many as fifteen Jewish community surveys will have been conducted by mid-decade. Either of the two techniques above could be used to create a national study out of local ones. A sample of respondents from the studies conducted to date could be interviewed to create a much smaller version of the National Jewish Population Study. While the validity of national projections from such a study would be problematic (because of inadequate geographic coverage), it would be particularly valuable for collecting a national sample of special populations (such as intermarrieds).

A national sample made up of cases from local studies would add a new dimension to the comparative analysis of Jewish community surveys. Various sociologists have incorporated comparisons of the findings of local surveys as part of a larger analysis. Marshall Sklare, in *America's Jews* (1971) and in his article "Intermarriage and the Jewish Future" (*Commentary*, April 1964), Sidney Goldstein, in his *American Jewish Year Book* articles, and most recently, Gary A. Tobin and Julie A. Lipsman in this volume (see next article) have done extensive comparisons of Jewish community surveys. They were, however, limited by the published tables. Even if they had access to all the data of all the studies they would still have been limited to the questions included in the studies. Then too, the differences in the formulations of the various surveys introduce a further variable. A national survey using comparably worded questions would greatly increase the reliability of the analysis. It would also add new dimensions to the kind of analysis that could be done. For example, there is a commonly held assumption that Jews with weaker Jewish and family roots are more likely to migrate to the west than those with stronger roots. A national sample made up of local respondents would make possible comparisons between Chicago, New York, St. Louis, Philadelphia, Boston, Milwaukee, and Cleveland Jews who have remained in their home communities with their counterparts who have migrated to Denver, Las Vegas, Phoenix, Los Angeles, Miami, and Washington, D.C.

In sum, we have little experience as of yet in the conduct of followup, trend, or longitudinal studies, critical as such efforts might be. Such experience will undoubtedly permit us to assess the value of alternative techniques in the future. In this paper we have tried to outline some of the most promising possibilities for followup studies, fully cognizant of the very limited undertakings in this area of Jewish population studies thus far.