

The 2007 Jewish Community Study of Metro Denver/Boulder

R&D Task Force on “Boomers” Jewish Connections-Engagement and Social Support Needs

Preliminary Research Plan

Submitted by

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to the

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The 2007 Jewish Community Study of Metro Denver/Boulder: R & D Team
Boomers: Jewish Engagement and Social Support Needs
Preliminary Research Plan

Purpose

The purpose of this R & D Team is to propose three to five powerful community-building initiatives that have a high probability of addressing the key needs of Jewish “Boomers” — Jewish adults currently ages 42 to 61 who were born between January 1946 (signifying the end of World War II, when hundreds of thousands of male war veterans returned to the US and created the “baby” boom) through December 1964 — and their families in the Metro Denver/Boulder area seven county area.

These initiatives, when implemented, should generate broader and deeper levels of Jewish engagement within this cohort and address the emerging social support needs of the Boomer generation as they plan for their futures, and the needs of their parents/relatives/friends for health care, human services assistance, and housing.

This R&D task force could develop options for helping boomers and the Jewish community to increasingly connect to each other, creating synergistic opportunities to combine the strengths of Jewish boomers and the Jewish communal infrastructure. Analyses would cover a broad range of issues, including:

- the transition to “empty nester”;
- the “sandwich generation” with responsibilities toward their children and their aging parents;
- the transition to “caregiver” status that may occur for many Boomers; and,
- the quality of Jewish-boomer household life (Jewish connections, volunteering for both Jewish and not-specifically Jewish organizations, philanthropy, physical health, emotional and spiritual well-being).

The Strategic Issues

Over the next three to five years, what are the best ways to create and execute opportunities that will help increase engagement, and Jewish learning, among Colorado’s Jewish Boomers — Jewish adults currently in their 40’s, 50’s and 60’s — in being Jewish (their own way), in Judaism (multiple paths), in Jewish community, and in increasing their commitments to the Jewish values of Tzedakah and volunteerism?

Simultaneously, how can the Jewish community’s infrastructure be utilized, and modified as needed, to help this generation address not only their social support needs, but also the needs of their parents?

How can we create / help increase a sense of excitement about, and enthusiasm for, Jewish experience and Jewish learning among the Boomer generation?

How can we assist the “Boomer” generation, their parents and aging relatives, and the Jewish community in defining areas where Jewish communal assets can be utilized to provide needed social services directly and/or to help link Boomers to existing services provided outside the Jewish community for boomers and their families?

How can we help plan for an anticipated increased relocation of Jewish Boomer parents to the seven-county area? What might be the scope of relocation? What impact will their migration to the area have upon existing Jewish infrastructure? How can the community plan for and serve their Jewish engagement needs?

Can we develop a model to integrate increased Jewish connections/engagement, and increased social service assistance/linkages by the Jewish community in the Metro Denver/Boulder area?

What kinds of investments and resources are likely to be the most fruitful in this area?

What kinds of investments need to be avoided? Which types of investments will unnecessarily replicate general community resources?

National Context

Considerable anxiety about the Boomer generation, their aging relatives, and the impact of retirement on the American economy has become almost a national preoccupation. Currently, there are over 78 million Boomers in the United States, the largest U. S. generation ever. The average 60-year old Boomer of today has a life expectancy of 81.6 years of age. In the year 2030, Boomers, then ages 66-84, have been projected to represent 20% of the total U. S. population. By 2030, the national population ages 85 and over should increase to 8.9 million (from 4.2 million in 2000). By 2050, there might be 1 million people over the age of 100 living in the United States.

Within the **Jewish** community, concern about Boomers has paralleled the general concern. Four months ago, United Jewish Communities (UJC) convened a national teleconference of federation planners which focused on “Aging of the Baby Boomers: Implications for the Jewish Federation System.” The background report issued for the conference reflected a UJC research office estimate that there were 1.4 million Jewish “baby boomers,” 25% of the national total of the National Jewish Population Survey 2001 (NJPS) estimate of 5.2 adult million Jews.¹

Some of the demographic variables identified in the UJC report based on NJPS data indicate the strong need to exercise caution when interpreting national data (or even Colorado data) on Boomers in the context of Jewish Boomers — especially in terms of financial resources and related issues.

- Jewish Boomers are much more financially secure. \$100,000 plus annual incomes are reported by 35% of Jewish Boomer NJPS respondents, as compared to 12% of non-Jewish boomers;
- 67% of Jewish Boomers have college degrees compared to 35% of non-Jewish Boomers

The Colorado Context

Two weeks after the first meeting of the Task Force on “Boomers,” some results from the Colorado Boomer Internet Survey will be released at the Rose Community Foundation (sponsored by Rose and the Colorado Trust), along with some additional insights from focus groups conducted by Rose Community Foundation. The presentation on June 28, 2007 will probably focus on six of the seven counties in the Jewish Community Study area (only Boulder is not covered in the Rose portion of the Colorado Boomer study, but Boulder is included in statewide study).

The project had a special focus on philanthropy and volunteering among all Boomers, partly reflecting the national data that had previously noted that not only did 33% of Boomers volunteer, but over half thought that they would volunteer more after retirement (which, for many, no longer meant age 65).

The Colorado Boomer study was restricted to Boomers 55-65, a slightly different age cohort than typically used as a Boomer definition — an issue that needs to be addressed by the Task Force, although we can assume that the life changing forces shaping the lives of the upper end of the Boomer continuum will be reflected in the 55-65 cohort. The data from the Colorado Boomer Survey will provide local Boomer context, and data in many areas beyond philanthropy and volunteering, including a demographic overview of the age 55+ general population in Colorado, and an assessment of employment, training and lifelong learning opportunities in Colorado for this age cohort.

¹ Both numbers are probably “low-end” estimates. The two most recent estimates of the Jewish population in the United States are consistent with an estimate of at least 5.2 million adult Jews.

The article sent to the Task Force which had been published in the *Chronicle of Philanthropy*, May 17, 2007 summarized some of the themes from this study, stressing the need for non-profits to focus on improving their volunteer infrastructure, so that the skills of the Boomers who want to volunteer their services can be best utilized. The presentation on June 28 should provide additional Colorado Boomer data, especially some baseline demographics (beyond age).

Two important notes about the Colorado Boomer Survey:

- The Colorado Boomer Internet survey included a question on religious affiliation, but the number of Jewish responses from a usable returned sample of under 800 Boomers will probably be under 50. We will need to see what the response rate was for this question in the Internet survey, whether the data will be available for the Task Force and (if so) when, and whether the number of completed surveys is sufficient for useful comparisons between Jewish Boomers and non-Jewish Boomers.
- The 2007 Metro Denver/Boulder Jewish Community Study was revised just before our survey interviewing began to include a question asked in the Colorado Boomers Internet Survey for comparative purposes: "Are you currently responsible for caring for an aging family member or friend." Thus, on this critical issue, we will have data from the Jewish Community Study which can be used to compare with answers from the Colorado Boomers Survey.

Sources of Information

The Boomers R & D group will use (at least) five kinds of information:

- 1) The knowledge, experience and ideas of the members of the R & D group (a sub-stratum of the Metro Denver/Boulder "Jewish Boomers");
- 2) Quantitative information about Jewish Boomers drawn from the 2007 Metro Denver-Boulder Jewish Community Study survey of 1,400 households (see Appendix I for examples of the kinds of questions the survey will enable us to answer).

Dr. Ron Miller, Research Director of Ukeles Associates Inc. (UAI) will be responsible for analyzing and organizing this data for the Task Force, but the framework of the analysis (age groupings, detailed cross-tabulation analysis) will be discussed with the Task Force members at the next meeting.

- 3) Qualitative information about Jewish Boomers and their aging parents — see Appendix II for examples of the kinds of questions that focus groups might enable us to answer. Task Force members must be involved in the development of the issues to be addressed in the Moderator's Guide for the focus groups — as the Task Force develops a notion of critical missing areas, or areas in which qualitative insight might be useful to supplement more quantitative data. UAI will have ultimate responsibility for organizing, conducting and analyzing focus group data, and issuing a report to the Task Force.
- 4) Information about current programs and experiences designed for Jewish (and non-Jewish Boomers) in the Metro Denver-Boulder area (see Appendix III for a preliminary proposed form for collecting this information). Maggie Miller, the overall Jewish Community Study Project Manager, has responsibility for this area, but input from Task Force members on the universe of programs/projects/initiatives to be “surveyed” is important, and needed in order to plan for the collection of this information, probably in early August
- 5) Information about national and community-based “models of excellence” in terms of planning for Jewish (non-Jewish also?) Boomers, their households, and their parents/friends. The UAI focus will be on national models, but will probably include some initiatives that are national in scope, and which local organizations are involved (such as the Rose Boomers study which is part of a national effort).

The Task Force's “Charge”

The Leadership Group and the Steering Committee of the 2007 Jewish Community Study have outlined the structure and responsibilities of all of the Task Forces (Boomers, Young Adults, Geography and Dispersion) in the “Research and Development Team Work Program” document, March 19, 2007, which has been sent to you already.

“Develop a plan for action and implementation. In the light of the research, and the quantitative analysis from the survey, the results of qualitative research, and the meetings with leaders, the Boomers R&D Team will recommend:

The most promising specific initiatives that the community should undertake, ideally in priority and sequence order that have a reasonably high probability of success (noting which ones require immediate action) .

- a) Possible relationship of specific initiatives to those identified by other R&D Teams, as appropriate.
- b) The specific steps to be taken to implement each initiative.
- c) The persons or organizations who agree to take the lead on coordinating the implementation of each initiative.
- d) The resources necessary to implement each initiative and a plan to acquire them.
- e) A realistic timetable for the beginning and completion of each initiative.
- f) Anticipated outcomes and measure of performance associated with each initiative.”

The Work Process

1. R & D Team brainstorms ideas about promising engagement experiences and programs
2. Develop and refine the Preliminary Research Plan -- R & D Team, UAI Research Team
3. Inventory current Jewish and non-Jewish programs in the Metro Denver area aimed at Boomers, their households, and their parents. Project Manager & R& D Team
 - a. What efforts are currently underway in the Jewish (and non-Jewish) community in the Denver area?
 - b. How many people are participating?
 - c. What impact are those efforts having?
4. Identify local and national models of excellence:
 - a. Of efforts currently underway in Denver, which are the most successful? Could they be replicated? Project Manager & R& D Team.
 - b. What national models of excellence or in other parts of the USA that we might adapt to the Greater Denver area? -- UAI Research Team and R & D Team.
5. Analysis of survey data. UAI Research Team and R & D Team.
6. Analysis of Colorado Boomer Survey information, as available. UAI Research Team and R & D Team.
7. Focus groups, qualitative information. UAI Research Team and R & D Team.
8. Drawing on brainstorming, quantitative and qualitative data analysis, and national and local models of excellence, prepare a briefing on promising strategic initiatives by UAI Research Team after discussion with R & D Team.
9. Meet with relevant community and agency leaders to discuss implementation opportunities.
10. Review the promising strategic initiatives in light of community and agency leader consultations.

11. Finalize the “Action and Implementation Plan.”

- The R&D Task Force will make recommendations to the full Steering Committee, and meet with them (as possible) to discuss the Action and Implementation Plan.
- The R&D Task Force will discuss the priority and order sequence of the proposed Plan with the Steering Committee.
- The R&D Task Force will read and review specific initiatives identified by the other R&D Teams, as appropriate.
- The R&D Team will discuss with the Steering Committee the specific steps to be taken to implement each initiative, the resources needed for the initiatives, a proposed timetable, and the persons or organizations who have agreed to take the lead in coordinating the implementation of each initiative.
- Anticipated outcomes and measure of performance associated with each initiative.

A Tentative Aggressive Timetable²

Task	Month
Brainstorm engagement ideas	June – Sept
Develop and refine the research plan	June, July
Inventory current Boomer-related programs and activities in the Metro Denver-Boulder area	July - August
Identify local and national models of excellence	July - August
Analysis of survey data	August
Prepare for, conduct and and analyze focus groups	August
Briefing on possible strategic initiatives	October
Meet with community and agency leaders to discuss implementation opportunities	November
Recommendations to Steering Committee	November-December

² Maggie Miller, Project Manager, is out of town and unavailable June 15 - July 25, 2007. Marlin Barad is also unavailable during a considerable portion of the time Maggie is not available.

Appendix I

Research Questions/Variables Relevant to the Boomers R&D Task Force Which Can Be Addressed by Data from the Jewish Community Survey

Demographic Variables

1. How many Jewish Boomers are there in the Metro Denver-Boulder area?
2. Age distribution — age boundaries to be discussed.
3. Gender distribution — comparison with national data, Colorado Boomers
4. Geographic distribution patterns. Do a relatively high proportion Jewish Boomer live in the Boulder area?
5. Newcomer status. Are the Boomers ore/less likely to be recent newcomers to the Metro Denver/Boulder Martial Status? Does it vary by geographic area?
6. Adult children in the household? inter-generational households?
7. Inmarried, Intermarried?
8. Financial status, employment, education

Jewish Connections

9. Is being Jewish important to Jewish Boomers? To all Boomers, or to a segment of the Jewish Boomer population?
10. Are Jewish Boomers likely to identify with a denomination or do they see themselves as nondenominational?
 - Does this vary by geographic area?
 - By Boomer age cohort?
 - How do Jewish Boomers compare with other area Jews in terms of denominational identification?
11. For those who do identify with a denomination, are they more likely to identify as Reform, Reconstructionist, Conservative, or Orthodox?
12. Do Jewish Boomers typically join a congregation? Are they active in one of the Study areas Jewish Community Centers (JCC)? Other Jewish organizations?
13. How important is spirituality to Jewish Boomers as an element in their Jewish identity?
14. What experiences during childhood/teen years seem to be associated with a greater sense of Jewish identification—day school, other kinds of Jewish education, summer camp, travel to Israel ...?

15. Do Jewish Boomers feel part of a Jewish community? Is it important to them to be part of a Jewish community?
 - Are there geographic area differences in terms of Boomer connections to Jewish community?
16. What percentage of Jewish Boomers contribute non-Jewish charities, to the Allied Jewish Federations, or to other Jewish causes?
17. Are Boomers more likely to volunteer for Jewish causes, nonsectarian causes, or both?
 - Are Jewish Boomers more committed to volunteerism than younger, older Jews?
 - How do Jewish Boomers compare to Colorado Boomers?
18. To what extent are Jewish Boomers attached to Israel?
19. What proportion of Jewish Boomers have traveled to Israel?
 - What is the relationship of travel to Israel with attachment to Israel?
 - Is this pattern the same as other Jewish households?
20. To what extent are Jewish Boomers “turned off ” to Israel because of concern about the treatment of Palestinians?
 - How is this variable — and the Israel connection/travel variables — related to inmarried/intermarried status, and other basic connections to Jewish life?

Social Support Services

21. What is the self-assessed health status of Jewish Boomers?
 - Is the older cohort among Jewish Boomers significantly different than younger Boomer cohorts?
 - Is Jewish organization activity related to Jewish Boomer health status?

22. What social support needs have Jewish Boomers sought assistance for in the year preceding the survey?

Survey data exists for:

- Serious, Chronic Illness
- A question which combines depression, anxiety, stress, eating disorder, emotional issues, relationship issues, drug or alcohol problems
- Serious Mental Illness
- Finding a job or choosing an occupation (Here data can hopefully be compared with Colorado Boomer Survey data)
- Assisting an elderly relative in the Metro Denver/Boulder area
- A child's learning disability
- A Physically or Developmentally disabled child or adult

23. How much difficulty did Jewish household Boomers experience when seeking assistance in the areas described above? Did Boomers have more or less, or the same level of difficulty in obtaining needed human services?

24. Did Boomers seek assistance from a Jewish agency or organization? Were they more or less likely to seek Jewish assistance than other age cohorts?

25. Did they get assistance from a Jewish source?

26. What proportion of Jewish Boomers (or someone else in their household) are "...currently responsible for caring for an aging family member or friend?"

- Does that person live in the Metro Denver/Boulder area, or outside?
- If outside the area, what proportion might "...move to, or have to move to, the 7-county Metro Denver/Boulder area within the next few years?
- How do Boomer age cohorts vary on these variables?

27. How concerned are Jewish Boomers about "Being able to live independently in your own apartment when you get older?"

- What variables differentiate those most concerned and those least concerned?

28. How concerned are Jewish Boomers with "Being able to take care of parents or other relatives who need help?"

- Again, what variables differentiate those most concerned and those least concerned

Appendix II

An Introduction to Research Questions to be Answered by Qualitative Research — Focus Groups

The data described in Appendix I that can be analyzed from the 2007 Jewish Community will provide a quantitative portrait of the Jewish Boomer community in the Metro Denver/Boulder area. As the survey data is discussed and analyzed from a Jewish Boomer perspective, members of the Task Force will undoubtedly begin to ask for more insight, for qualitative information that will add depth to the statistical summaries.

The preliminary research plan, and the budget for the Task force, anticipates two focus groups being conducted in August, 2007 to provide qualitative insights (although it is possible that some other form of qualitative research could be substituted for the focus groups). UAI will be responsible for organizing, conducting and analyzing these focus groups, and for defining the questions to be included in the Moderator's Guide. The Denver research company that conducted the 1997 survey will assist the UAI Research Director in the focus group tasks, as they have done in other Jewish community studies.

The R&D Task Force, or a subcommittee, should also be actively involved in the delineation of the research questions to be asked, and the construction/review of the Moderator's Guide. Thus, the questions to be included will necessarily emerge organically from the other phases of the project. However, a few key areas for qualitative exploration reflect some of the quantitative data issues, and provide examples of the types of issues to be explored:

- How important is Jewish agency provision of services to Jewish Boomers?
- What has been their experiences — positive and negative — with efforts to receive services from Jewish agencies?
- What do Jewish Boomers anticipate that the Jewish community will do for them in terms of Jewish social service advice/assistance for both Boomers and their aging parents/relatives for whom they have caretaker responsibilities, or for whom they may have to become caretakers?
 - Under ideal circumstances, what would they want the Jewish community to do?
 - What assistance do they want/expect from the Jewish community in terms of assistance for either relocating elderly parents to the Metro Denver/Boulder area or for providing assistance to them where they live via the concept of a “continental” Jewish caretaker assistance program?

- What do Jewish Boomers anticipate that the Jewish community will provide for them in terms of Jewish educational opportunities, and for volunteering opportunities?
 - Under ideal circumstances, what would they want the Jewish community to do?
 - Do they want Jewish opportunities only, non-Jewish, or both — and why?
- Do Jewish Boomers prefer to do social action in a Jewish setting, or do they not interpret social action engagement from a Jewish perspective; do those who are pre-committed to the salience of being Jewish prefer a Jewish setting for volunteerism and social action, while others do not?
- What opportunities exist — should exist — for expanded Jewish learning for Jewish Boomers in the Metro Denver/Boulder area?
 - For Jewish connections for them?
 - For Jewish connections, engagement, learning for their parents?
- Are moderately affiliated and/or interfaith Jewish Boomer families interested in increasing their connection to being Jewish and to the Jewish community? What kinds of involvement are they interested in? Is there a subgroup that is pre-disposed to being more Jewish (seekers)? What seems to differentiate Boomers who are already involved, that are becoming more involved, and those that are minimally involved?
- What are the critical success factors that make good programs for building engagement and involvement? Are some communal investment strategies more effective than others? Are strategies for engaging Boomers similar to or radically different from strategies for engaging young Jewish adults?

During the Task Force's exploration of potential Jewish Boomer initiatives, a series of additional issues and questions will probably emerge — and the Task Force might decide to use the focus group (mid-end August) to test reactions to various initiatives that have been discussed. Identification of these possible initiatives sufficiently early to allow focus group “testing” is highly desirable.

Appendix III

Analysis of Metro Denver/Boulder Programs Relevant to the Jewish Boomers Task Force

Maggie Miller, the Jewish Community Study Project Manager, will have primary responsibility for analyzing local programs relevant to the Boomers Task Force — hopefully assisted by members of the Task Force. Potential tasks designed to document local programs/initiatives for Boomers include:

(A) Inventory current engagement programs specifically designed to attract Jewish Boomers to engage Jewishly

Purpose: To create a catalogue of all programs in the 7-County Metro Denver/Boulder area which focus on connecting Jewish Boomers to Jewish experience.

Potential Work Steps:

- Create an email survey (or Zoomerang) to collect information; see Appendix V.
- Contact agencies to elicit their participation, send draft of survey for comments
- Send revised survey
- Survey completed and returned
- Prepare summary of information
- Review summary and develop indicators of success — see Exhibit II below

(B) Inventory local programs providing social services for Jewish Boomer and their parents — including relocation/assistance program for parents currently living in other communities

Work steps similar to above.

Work process would occur simultaneously with Jewish connections cataloguing efforts,

(C) Identify local models of excellence in engaging Jewish Boomers in Jewish life or in providing social/human service assistance.

Purpose: To conduct in-depth investigation of those programs which indicate successful experiences with Boomers/Jewish Boomers in the analyses described in Tasks A and B above.

Success indicators might include whether the program focuses on Jewish engagement and/or social services provision (Jewish and non-Jewish) for Boomers and their parents, whether the program has a significant number of Boomer participants (Jewish and/or non-Jewish), whether the program can document success in engaging and/or serving Boomers in the local area, whether the program has been growing (5% annual growth in past 3 years?), and whether the program has involved disconnected and intermarried Jewish Boomers who have recently moved to the Study area:

- Identify the most promising programs (perhaps 3-5) to investigate more closely. These programs would be selected.
- Maggie conducts interviews with leadership of most promising programs
- Maggie prepares report for R&D Team identifying the most successful programs as candidates for expansion and/or replication.

Appendix IV

Analysis of Metro Denver/Boulder Programs Relevant to the Jewish Boomers Task Force

Ukeles Associates is responsible for identifying national programs, or statewide programs, that appear to offer the greatest promise for insight into the basic issues addressed by the Boomers Task Force. Hopefully, Task force members and/or members of the Rose Community Foundation's "Boomers Leading Change" committee can help identify national models of excellence, since the Denver area project is part of a broader national effort funded in part by Atlantic Philanthropies.

At this point, Ron Miller is responsible for paralleling Maggie Miller's local efforts from a broader national/statewide perspective. UJC's Jewish Boomer and Caretaker programs might be included in this review effort, depending on their current status — just as the Rose Community Foundations' local Boomer Initiatives would hopefully be included in the local program analysis, depending upon the stage of development.

Appendix V

Potential Structure and Questions for Survey of Local Programs

Please note that this phase of the project will not occur until August, and will be informed by the experiences that Maggie Miller has had when she explores local programs designed for Young Adults in the Metro Denver/Boulder area. Rather than combine questions on young adults, Boomers and geographic dispersion issues into one data collection effort, the young adults local program analysis will occur first, and the Boomers analysis should benefit from the young adult information collection experiences.

Below, is a slightly modified version of the format proposed in the Young Adults Task Force document. In early August, a final version will have been developed by Maggie (and some R&D Task Force members, as feasible) and presented to the Boomers Task Force for review. The data requested below should only be viewed as illustrative.

Name of Program: _____

Name of sponsoring agency/organization: _____

Location(s): zip code: _____

Year Established: _____

Annual Budget (2006, 2007): _____

Mission or Purpose:

Target Populations: (e.g. age group, location, denomination, life status [e.g., singles, sandwich generation], other defining characteristics)

Brief Program Description:

Contact Information: Name, Phone Number, Email Address. _____

Number of Participants		2003	2004	2005	2006
Enrolled, Members or Regular Participants	Number				
	% change				
Total participation (including multiple visits of same participant)	Number				
	% change				

Top five zip Codes of Participants (in rank order, from highest) in 2006

Zip Code	Number of <u>Boomer</u> Participants (members, enrollees or regular participants)

Comments about participation:

How do you measure success?

What results do you believe the program has had?
