
A MARKET SEGMENTATION STUDY OF THE GREATER MIAMI JEWISH COMMUNITY



and

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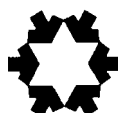
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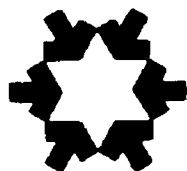
A Market Segmentation Study of the Greater Miami Jewish Community

Strategy Research Corporation
Miami, Florida

and

Ira M. Sheskin, Ph.D.

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Department of Geography
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The Greater Miami Jewish Federation

September, 1992

Dr. Ira M. Sheskin

Dr. Ira M. Sheskin is an Associate Professor of Geography and a Member of the Judaic Studies Faculty at the University of Miami. He has completed demographic studies for all five Jewish Federations in South Florida and for the Sarasota-Manatee Jewish Federation. He has also completed a major study of teachers in Dade County Jewish schools for the Central Agency for Jewish Education in Miami and has been a consultant to a number of South Florida JCCs and synagogues. He is the editor of the semi-annual publication *Florida Jewish Demography*.

His work on the Jewish population of South Florida is frequently cited in the local and national press. He is a member of the National Technical Advisory Committee of the Council of Jewish Federations, which completed The 1990 National Jewish Population Survey. He is currently authoring a book from this study entitled *The Geography of American Jews*.

Dr. Sheskin served on the Board of his synagogue (Temple Samu-El • Or Olom) for six years, on the Board of Florida Hillel Council, Jewish Vocational Service, and the University of Miami Hillel. He is currently on the Board of the South Dade Branch of the Greater Miami Jewish Federation.

Strategy Research Corporation

Strategy Research corporation was founded in 1971 and is one of the largest, full-service marketing companies serving the United States and Latin America from offices in Miami, Los Angeles, and New York. SRC maintains field offices and staff in 25 major North American markets and now conducts over 250,000 interviews annually in these markets. SRC is the third largest supplier of the nation's television ratings and is among the top 50 research firms in the country. Corporate, marketing and media clients include Fortune 500 and Latin American Companies, major media corporations, international advertising agencies as well as regional and local firms. SRC has in interdisciplinary staff trained in marketing research as well as brand management, advertising, media, data basing, and economic forecasting.

Introduction

This report arises from the Marketing Segmentation Study of the Greater Miami Jewish Federation. The study commenced in January, 1992 and was completed in June, 1992. The study included one-on-one personal interviews, focus groups, and a telephone survey.

The significant changes that have occurred in the Greater Miami Jewish community, and in the American Jewish community as a whole in recent decades, speak to the need for new and novel approaches to fund raising. The demographic character of Jewish life in the United States is changing rapidly. Migration of Jews between urban areas and between neighborhoods within urban areas, intermarriage levels, organizational affiliation rates, changes in friendship patterns, and various other factors are impacting the Jewish community in ways that are having a significant impact upon philanthropic behavior. The success of the Jewish community in the United States in insuring Jewish continuity and in assisting Jews in the United States, the people of Israel, and Jews around the world, depends upon the level of philanthropic generosity of the American Jewish community. Thus, as the American Jewish community changes, we must develop new fund raising techniques that will be effective in our changing environment. Our methods must be tailored to our market.

But we must begin to build a campaign based upon sound information. Research and planning have become essential components of the activities of the organized Jewish community in the United States. More than 50 community and marketing studies have been completed in American Jewish communities since 1980, and a National Jewish Population Survey was conducted by the Council of Jewish Federations in 1990. While these studies have all examined a variety of issues, many have looked at issues related to methods for increasing fund raising efforts.

At the same time, we should keep in mind that Federation in Miami is probably the most successful philanthropic organization in the county. UJA/Federation nationally is one of the most effective philanthropic bodies in America. Thus, while this report points to alterations that should be considered, such changes should be carefully examined.

Comparison Communities. Where possible results of this survey are compared to other Jewish communities. These comparisons are limited to communities where recent community surveys have been conducted, and by whether similar questions were asked. For a complete list of the communities for each question, see the main report.

Methodology

This study was conducted in three stages: one-on-one interviews, focus groups, and a random telephone survey.

The **first stage** involved qualitative research with 25 individuals from five different groups: 1) Federation Board Members, 2) Individuals who donate \$100,000 or more annually to Federation, 3) Individuals who donate \$25,000-\$100,000 annually to Federation, 4) Individuals who donate \$500-\$5,000 annually to Federation, and 5) Non-contributors to Federation.

The **second stage** involved qualitative research using four focus groups, each with 7-10 members: 1) Individuals who donate \$5,000 or more annually to Federation, 2) Individuals who donate \$500-\$4,999 annually to Federation, 3) Individuals who donate \$25-\$499 annually to Federation, and 4) Non-contributors to Federation.

The emphasis in the one-on-one interviews and focus groups was to explore experiences with Federation's fund raising and to ascertain opinions about Federation fund raising. The hypotheses developed from these two stages were used to help design the telephone survey.

The **third stage** involved a quantitative survey conducted via telephone, utilizing the appropriate sample design, questionnaire development process, and analytical techniques.

A random telephone survey was selected as the mechanism to reach Jewish households in Dade County. For each selected exchange, Bresser's reverse telephone directory for Dade County was consulted. Four digit numbers were randomly selected from Bresser's and a "1" was added to each. Thus, for exchange 255, if the number 255-2265 was selected from Bresser's, the number 255-2266 was dialed. This procedure assures a reasonable sampling of households who choose not to be listed in the telephone directory. When an interviewer dialed these numbers, there was no guarantee that a residential household, let alone a Jewish household, was reached. In fact, thousands of different numbers were dialed to produce the 576 successful interviews. The remainder of the numbers dialed were either disconnected, not in service, changed to an unlisted number, changed to a new number, businesses, no answer, fax machines, or non-Jewish households.

? Why
A separate sample was drawn from Bresser's directory for the Northeast Condo area. In addition, a random sample of 50 interviews was completed with Pacesetters on the Federation's mailing list. None of these 50 are included in the sample of 576 surveys that are reported upon in this report.

Geographic, Demographic, and Religious Profile

Factual Summary

- Current research indicates that about 25% (22,424 households) of Jewish *households* live in South Dade, about 30% (27,450) in The Beaches, and about 45% (42,519) in North Dade. This compares with 40% (45,762) in North Dade, 22% (22,589) in South Dade, and 38% (43,880) in The Beaches in 1982.
- Approximately 13% of Jewish households reside in zip 33160 in North Dade; another 10% reside in 33162. Thus, almost one in four Dade County Jewish households live in one of two zip codes; about one in three live in either 160, 162, or 179 in North Dade.
- Only 3.8% (3,437 households) of households contain a Hispanic Jew.
- Overall, 44% (35,453 households) of Jewish households in Dade County live in single family homes, 40% (36,453 households), in high rises of four stories or more, and 16%, in townhouses, quadriplexes, villas, apartment complexes, and garden apartments.
- About 3% (2,713 households) of households are here 3-7 months (part-year households) and 97%, 8-12 months (full-year households).
- 11% (10,040 households) of all households have moved to Dade County within the past 5 years. Another 9% have arrived during the past 5-9 years. Thus, 20% of all households have been living in the area for fewer than ten years. 30% have been here for 10-19 years, and 50% (45,136 households), for 20 or more years.
- The percentage of long-term residents in Dade County (50% for 20 or more years) is higher than in any comparison Jewish community and is much higher than in places like West Palm Beach (8%), South Broward (16%), and Washington, DC (12%).
- Compared with 1982, the survey respondents are about five years younger. The most important change is that the percentage of respondents in the 35-49 age category has increased from 12% to 26%, while the percentage age 65 and over has declined from 50% to 42%. Thus, while the elderly still predominate, the percentage of respondents in the 35-49 age group has more than doubled since 1982.

Geographic, Demographic, and Religious Profile

- The average household size (2.3) is at about the middle of the comparison Jewish communities. The percentage of single-person households (30%) is higher than any comparison Jewish community, except South Broward (31%). It compares to 23% in Washington, DC, 22% in San Francisco, and 23% in Boston. Household size is highest in South Dade (average of 2.6) and North Dade (2.4) and lowest on The Beaches (1.7).
- The most common household type is households with children at home (24%, 21,347 households). 19% (16,915 households) are single elderly and 20% (17,639 households) are married elderly. About 11% (9,949 households) are single non-elderly and 12% (10,764 households) are married non-elderly.
- The changes over the past 20 years (1971-1992) in household structure are pronounced. The percentage of single person households has increased from 16% to 30%. The percentage of married couples with no children at home has increased from 23% to 31%. The percentage of households with children has decreased from 54% in 1971 to 24% in 1992.
- 59% of households (53,277 households) contain a respondent who is currently married, versus 61% in 1982 and 67% in 1971.
- 43% of respondents indicated that the value of their houses is under \$100,000, 47% indicated housing values of \$100,000-\$249,999, and 11% live in homes they value at \$250,000 or more.
- Overall, 76% of households (69,016 households) earned under \$75,000 in 1991; 24% (21,438 households), over \$75,000.
- 10% (9,045 households) consider themselves Orthodox; 36% (32,654 households), Conservative; 24% (21,618 households), Reform; and 30% (27,136 households) "Just Jewish."
- 20% on The Beaches are Orthodox, 10% in North Dade, and less than 1% in South Dade. Conservative Jews form 30%-40% in each of the three regions. Reform Jews constitute 30% in South Dade, but only 23% in North Dade and 19% in the Beaches. By age, some evidence exists for a growing young Orthodox population: 16% under age 35 responded that they are Orthodox.

Geographic, Demographic, and Religious Profile

- 10% of currently married couples involve one person who is Jewish and one person who is not (termed an "intermarriage"). Thus, 90% of married couples involve two Jews (termed an "in-marriage"). There are about 5,168 households in Dade County containing intermarried couples. The percentage of intermarried couples is almost double the percentage of ten years ago. It has risen significantly for the 65-74 age group. Intermarriage reaches about 25% for those under age 35.
- 44% (40,071 households) of households indicate *current* synagogue membership. This rate does not vary among the geographic areas, but is much higher for Pacesetters at 88%. The rate peaks for the 35-49 age group at 56%
- 48% of respondents (43,056 households) report having made at least one trip to Israel. This percentage is lower in South Dade (36%) than in North Dade (50%) or the Beaches (56%). 66% in the Northeast condos have been to Israel, as have 90% of the Pacesetters.

Implications and Recommendations

- The clustering of the Jewish population in North Dade and The Beaches warrants consideration of the establishment of regional offices for these two areas, as is the case for South Dade.
- The clustering of Jewish population in a small number of zip codes should make the provision of social services in these areas easier than in areas where the Jewish population is spread out.
- Billboard advertising, targeted direct mail, and community-based publications may prove useful in a limited number of zip codes: 33160, 33162, 33179, 33180.
- Federation should continue to plan in the face of a declining Jewish population, particularly on The Beaches.
- Jewish households are still moving in to Dade County, more than 10,000 in the past five years and more than 6,200 during the past three years. Many new residents are in the Northeast condo area.

Geographic, Demographic, and Religious Profile

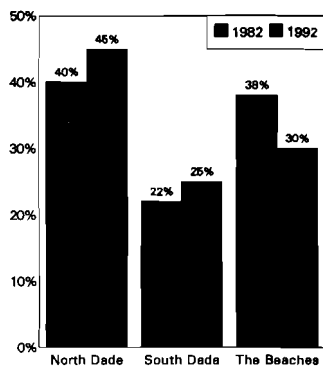
- Hispanic Jews are a small (4%), non-monolithic percentage of the population, but do represent a distinct growing group. Federation should continue its efforts to incorporate this population into the campaign.
- The high percentage of households living in high rises suggests that additional study is warranted of the high rise campaigns to make them more effective. The clustering of large numbers of households (36,453) in high rises suggests that this is one of the most important market segments in the county.
- Demographic studies in other Florida communities have shown that part-year residents have much higher income than full-year residents, are more likely to be philanthropic, and are more likely to join synagogues. While the potential “payoff” is high from involving this group in the community, they are a relatively small percentage (about 2,700 households) of the population.
- Dade County has a higher percentage of households with lengths of residence over 20 years than any other American Jewish community for which information is available. A campaign aimed at convincing people that Miami is now their “home” and they need to support institutions in this area should prove effective.
- One of the most important findings of this study is that the percentage of respondents between the ages of 35-49 has more than doubled in the past decade. This is the “baby boom” generation. Other results in this report show that this group is distinct from those who are younger and those who are older. Federation should consider re-orienting itself to appeal to this group.
- The elderly still form the largest age group, with over half of the respondents being age 65 and over. Their need for social services will increase over the next decade as this population continues to age and as life spans increase. Methods should be studied to successfully involve this group in the campaign.
- The large percentage of elderly argues for emphasis on endowment giving.
- The large percentage of single-person households implies an increasing need for social services, because of a lack of a support system within the household.

Geographic, Demographic, and Religious Profile

- While single parent families often have special needs, they are a decreasing percentage of households.
- Married respondents are more likely to make donations to philanthropies. Thus, the decline in married households has implications for the campaign.
- The large percentage of households with incomes in excess of \$75,000 implies significant potential for the campaign. This is especially true among the baby boomer generation, age 35-49.
- The growing population of young Orthodox should be noted and efforts to incorporate this population could prove fruitful.
- About 10% of married couples are now intermarried. This amounts to more than 5,000 households. The percentage of intermarried households will doubtlessly increase in the future. Methods will need to be devised to incorporate this population into the community. The 1990 National Jewish Population Survey shows that nationally only 12% of intermarried households give to Federation, in contrast to 45% of households in which everyone is Jewish.
- With more than 40,000 households claiming synagogue membership, Federation should concentrate efforts on synagogue/Federation relations, including continuing such efforts as Federation Sabbaths.
- While a large percentage of this community has been to Israel, efforts should be continued to send more persons to Israel, particularly those under age 50 and the intermarried. Having been to Israel is shown by this study (and numerous community studies) to have a significant positive impact upon levels of religiosity, "Jewishness," and philanthropy.

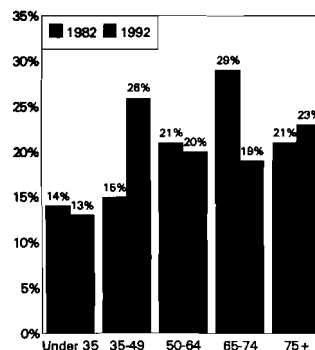
Geographic, Demographic, and Religious Profile—Graphical Summary

Distribution of Jewish Households



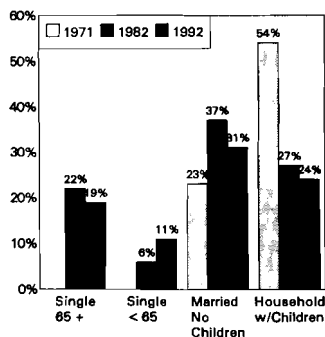
*Increases in the % in North and South Dade
Decrease in the % in The Beaches*

Age of Respondents



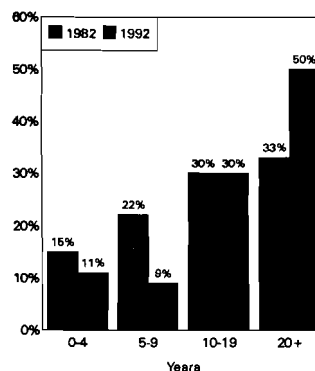
*Significant increase in the % of 35-49 age group
Significant decrease in the % of elderly*

Household Structure



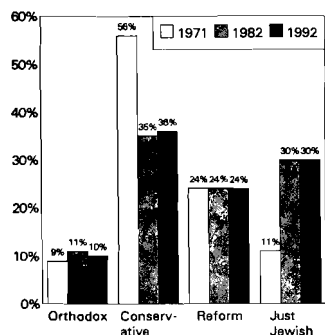
*Significant decrease in % of households with children
Decrease in % of single elderly and married no children
Increase in % of single non-elderly*

Length of Residence in Dade County



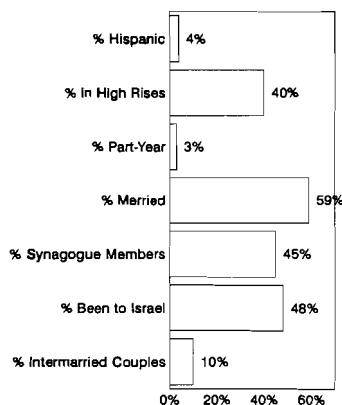
*Significant decrease in % of new residents
Half in residence for 20 or more years*

Jewish Identification



*No change in Orthodox or Reform
Significant decrease in Conservative
Significant increase in Just Jewish*

Other Demographic and Religiosity Findings



Philanthropic Profile

Factual Summary

- The vast majority (96%) of Dade County Jews have at least "heard" of the Greater Miami Jewish Federation. This percentage has not changed since 1982.
- About 38% of respondents indicated that they are "very familiar" with Federation, about 46% indicated "somewhat familiar," and only 16% indicated "not at all familiar." The level of familiarity is much higher than three other Florida Federations for which comparison information is available.
- A large proportion of respondents (41%) who give to the Federation indicate that they are only somewhat familiar with Federation. 18% of those who were not asked to give indicate they are very familiar with Federation. 36% of households who give between \$100 and \$499 to Federation indicate that they are only somewhat familiar with the Federation.
- 30% of respondents indicate "strongly positive" feelings about the Federation, 39% indicate "somewhat positive" feelings, and 27% declined to provide an opinion. Only 4% are "somewhat negative," and 1% are "strongly negative." Comparison with results from the 1982 demographic study shows that the percentage of strongly positive opinion has declined by about 5%, but the percentage of somewhat positive opinion has increased by 11%. The percentage with no opinion declined by 3%. The percentage on the negative side of this question has declined from 8% to 5%.
- More than half of respondents who indicated they are "very familiar" with Federation indicated strongly positive feelings about Federation; about 5% indicated negative feelings about Federation.
- Among non-givers who were asked to give to Federation, only about 11% feel negatively about Federation.

Philanthropic Profile

- About 70% of Jewish households contribute to Jewish charities. This is about equal to South Broward (71%), but is much lower than West Palm Beach (91%). It compares to 95% in Boston, 69% in Chicago, 66% in Baltimore, and 60% in San Francisco. Overall, 70% is on the low end of comparison Jewish communities, although it is higher than the 62% shown for entirely Jewish households in the 1990 National Jewish Population Survey, and is certainly higher than the 63% for Miami in 1982 (which also included some respondents who contributed only to non-Jewish charities).
- There is no precipitous decline with age in whether respondents give to Jewish charities.
- Having been to Israel and joining a synagogue both have positive effects on giving to Jewish causes.
- About 40% of Jewish households claim to contribute to the Greater Miami Jewish Federation. This is less than in South Broward (46%) and West Palm Beach (56%). Only San Francisco has a lower level of giving to Federation of the comparison Jewish communities. 25% in San Francisco, 39% in Boston, 43% in Detroit, 44% in Washington, and 74% in Cleveland donate to Federation. The percentage is also lower than the 45% shown for entirely Jewish households in the 1990 National Jewish Population Survey.
- The percentage of households making a donation to Federation is significantly lower in The Beaches (31%) than in North Dade (71%) or South Dade (45%).
- That Orthodox Jews are less likely to support Federation than Conservative or Reform Jews, but were as likely to support Jewish charities as Reform Jews is consistent with the idea that some Orthodox Jews tend to support Orthodox Jewish charities and not the Federation.
- About 19% of Jewish households contribute \$500 or more to Jewish charities and 13% contribute \$1,000 or more.
- The level of giving to Jewish charities has declined some since 1982: 41% of givers now give less than \$100, versus only 34% in 1982. The percentage in the \$1,000 and over category has not changed. Compared to the non-Florida communities, Miami shows a relatively high rate of giving to Jewish charities. In Florida, Miami is about equal to West Palm Beach (21%) and South Broward (20%) in the percentage who donate \$1,000 or over.

Philanthropic Profile

- About 7% of Jewish households contribute \$500 or more to the Jewish Federation and 5% contribute \$1,000 or more.
- Miami has about average levels of giving to the Federation compared to other Jewish communities. The percentage donating \$1,000 and over (13%) is a bit higher than South Broward (11%) and is somewhat lower than West Palm Beach (16%). It compares to 21% in Washington, DC, 6% in Boston, and 10% in New York.
- 18% in the Northeast condo area donate \$500 or more to Federation.
- Overall, 65% of respondents claim they have been contacted by Federation in Miami at some point in their lives. 59% say they were contacted in either 1991 or 1992. 45% say that they have been called on at least one Super Sunday.
- Relatively large percentages of important market segments are not being contacted by Federation, including 30% of residents in the Northeast condo area, 44% of high rise residents, 50% of the population on The Beaches, and 21% of households with incomes in excess of \$75,000.
- 40% of households claim to have donated to the Federation in 1991 or 1992. 19% indicate they were contacted to give, but declined to. 42% indicate that they were not asked to give.
- Respondents who indicated that they have been called on a Super Sunday were asked to rate the quality of the solicitation on a four-point scale. Overall, 18% replied excellent, 64% good, 16% fair, and 3% poor.
- 41% of respondents indicate that they are most likely to respond to a mailing from a charitable organization. 35% indicate they would prefer a telephone call with someone they know. 21% indicate they would like to receive something in the mail and then receive a telephone call. Less than 3% indicate a preference for a telephone call from someone they do not know.
- About one-third of respondents give \$100 or more to at least one Jewish charity. About 33% of those giving \$100 or more to a Jewish charity indicated they give \$100 or more to the Greater Miami Jewish Federation. Another 25% mentioned a synagogue. Hadassah, B'nai B'rith, and the JCC are other important recipients. Only 4% give \$100 or more to another Federation.

Philanthropic Profile

Implications and Recommendations

- The vast majority of Jews (96%) in Dade County have “heard” of the Greater Miami Jewish Federation, and this is the case for all market segments. While having heard of an organization does not imply familiarity with its purpose, clearly Federation has no name recognition problem.
- While name recognition is high even among those in residence for less than 5 years, some effort might be made to incorporate new households into the community, via the “Shalom Wagon” idea, real estate listings, and new residents lists. This strategy might be most effective in the Northeast condo area.
- While name recognition is high among those under age 35 (91%), it is somewhat below the average of 96% for all Jews. It is likely, however, that without any effort, recognition levels will rise as members of this group marry and join synagogues.
- While a high level of name recognition exists for the Federation, a large percentage of respondents, including 41% of givers, are only somewhat familiar with Federation. It is clear that further education of the public as to the purposes of the Federation should lead to higher levels of giving. This high level of being only somewhat familiar is true both for high rise respondents and synagogue members.
- That 36% of those in residence for less than 5 years are not at all familiar with Federation supports more emphasis on incorporating recent residents (about 2,000 households per year) into the community. This should have a reasonable level of return for many years.
- Federation in Miami is much better known than is the case for other Florida Federations. While this is due in part to the longer lengths of residence in the population, it is also testament to the effectiveness of the communications program of the GMJF.
- Evidently most Jews in Dade County have a positive opinion of the Federation. Some negativism needs to be overcome with Orthodox Jews and those under age 35.
- With only 11% of those who turned down a request reporting negative feelings about Federation, it is clear that other reasons exist for turning down requests, other than the Federation itself.

Philanthropic Profile

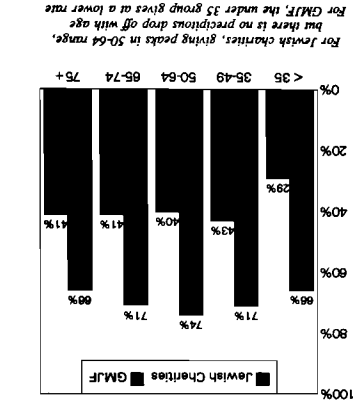
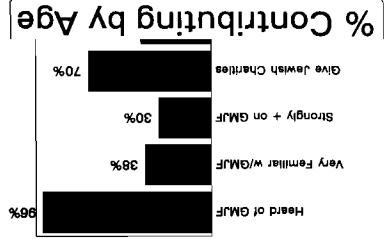
- That 21% of those not asked to give have strongly positive feelings about Federation (and 34% have somewhat positive feelings) implies that asking more people should lead to higher levels of giving.
- There is no precipitous drop off with age in whether respondents give to Jewish charities.
- Having been to Israel and joining a synagogue both have positive effects on giving to Jewish causes. Strengthening Jewish identity via synagogue membership and trips to Israel has philanthropic benefits.
- That Orthodox Jews are less likely to support Federation than Conservative or Reform Jews, but were as likely to support Jewish charities as Reform Jews, is consistent with the idea that some Orthodox Jews tend to support Orthodox Jewish charities and not the Federation. Efforts are needed to convince this group that Federation is a cause worthy of their support.
- That the percentage of Dade County Jewish households donating to Jewish charities has increased since 1982, but the percentage donating to Federation is apparently down should be a cause for some concern.
- The high level of giving to Jewish charities among the Orthodox implies that they represent a potential market if they can be convinced to direct more of their charitable dollars toward Federation.
- The importance of the Northeast condo area is shown by the fact that 38% in that area donate \$500 or more to Jewish charities and that 18% in that area donate \$500 or more to the Federation.
- While Federation will never "reach" all Jewish households, large percentages of important groups are not even being asked to give. Federation should consider full-time personnel whose sole job is to identify Jewish households not on Federation's list and to make contact with these households. Households may be identified by using distinctive Jewish names and from organizational membership lists.
- Two groups may warrant special attention to discern reasons for turning Federation down: those in the Northeast condo area and Orthodox Jews.

Philanthropic Profile

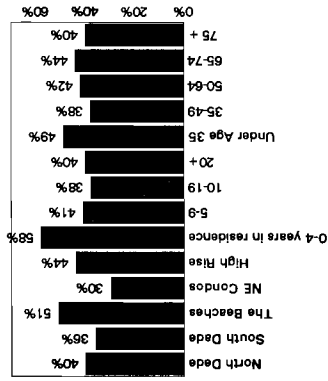
- That 18% of respondents who have been solicited on Super Sunday indicate the solicitation was either fair or poor and only 18% consider it to have been excellent, suggests that continued emphasis be given to improving the quality of solicitation on this important day through training and customer relations programs.
- Federation does much of its telephone solicitation by having strangers call one another. While a community this size is likely to have to continue this practice, the results show that people are much more likely to respond when called by someone they know. Often, telephone solicitors are reluctant to call persons they know. When possible, Federation may need to convince solicitors (by using the results of this survey) that they can be more effective soliciting people they know.
- The results also argue strongly for personal telephone solicitations of givers in the \$500 and over range.
- There is some preference for a mailing followed by a telephone call as an effective fund raising technique.
- Almost all Jews indicate that they have heard of the Greater Miami Jewish Federation, the vast majority indicate that they are at least "somewhat familiar" with Federation, and the vast majority of respondents with an opinion about Federation express positive feelings. Yet, of 20 comparison Jewish communities, the giving rate to Federation of 40% is lower than all but San Francisco and is about equal to Boston and Columbus. Federation needs to examine its market: people have heard of Federation, they know something about it, they feel positive about it, but many do not give.
- Many givers of significant sums indicate that they are only somewhat familiar with Federation, suggesting the need for educational programs.
- The percentage of Dade County households claiming to be asked to give to Federation has declined from 1982 to 1992. The percentage giving to Jewish charities has increased, but the percentage giving to the Federation has declined. In many demographic studies respondents have been asked why they do not give to Federation. "I was not asked" is often the most common reply. Note that this decline is particularly troubling given the significant decline in the total number of households over this period.

Philanthropic Profile—Graphical Summary

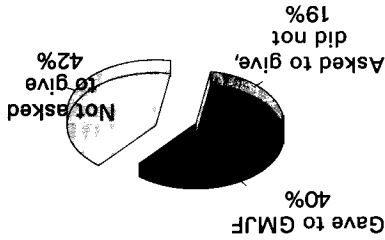
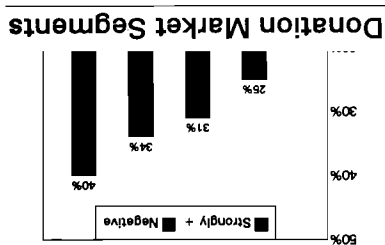
Relationship to GMJF and Jewish Charities



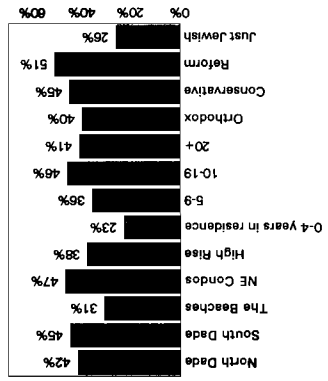
% Not Asked to Give to GMJF



Opinion of GMJF by Age



% Contributing to Federation



Importance of Reasons to Donate to Jewish Causes

Factual Summary

Importance of Reasons to Donate to Jewish Causes (Don't Know omitted)				
Service/Program	Very Important	Somewhat Important	Not at All Important	Total
Social Services for the Jewish Elderly	78.5%	20.1	1.4	100.0%
Combating Anti-Semitism	70.3%	26.8	2.9	100.0%
Jewish Education for Children	69.6%	28.3	2.1	100.0%
Support for the People of Israel	67.4%	30.2	2.3	100.0%
Jewish Individual and Family Counseling	53.9%	43.1	3.0	100.0%
Jewish Preschool and Day Care	51.2%	43.9	4.9	100.0%
Resettlement of Russian Jews	43.8%	50.2	5.9	100.0%
Recreational Programs for Children	42.9%	49.0	8.1	100.0%

● Overall, 22% indicated that they feel “a great deal” of anti-Semitism exists in the Miami area. 45% feel there is “a moderate amount”; 30%, “a little”; and 3%, “none at all.” This is one of the highest perceptions of anti-Semitism of any American Jewish community.

Importance of Reasons to Donate to Jewish Causes

Importance of Factors as Reasons to Donate for 13 Major Market Groups			
1. North Dade Israel (+) Counseling (+) Russian Jews (+)	2. South Dade Israel (-) Russian Jews (-)	3. The Beaches Counseling (-) Recreation Children (+)	4. NE Condos Anti-Semitism (+) Jewish Education (+) Israel (+)
5. Under Age 35 Elderly (-) Anti-Semitism (-)	6. Age 35-49 Israel (-) Counseling (-) Russian Jews (+)	7. Age 65-74 Israel (+)	8. Age 75 + Jewish Education (+) Counseling (-) Russian Jews (+) Recreation Children (+)
9. Pacesetters Elderly (+) Jewish Education (+) Israel (+) Russian Jews (+) Recreation Children (+)	10. Bigger Givers Anti-Semitism (+) Jewish education (+) Israel (+) Counseling (-) Preschool (+) Russian Jews (+) Recreation Children (+)	11. Been to Israel Israel (+) Russian Jews (+) Anti-Semitism (+)	12. Synagogue Members Jewish Education (+) Israel (+) Jewish preschool (+) Russian Jews (+) Recreation Children (+)
13. High Rise Respondents: No differences.			
Explanation: The table shows the factors that are either significantly more important (+), or significantly less important (-) to each group.			
For groups 1-9 and 13, a + sign means that this group rated this factor higher than Dade County Jews in general; a - sign indicates that this group rated this factor lower than Dade County Jews in general.			
For groups 10-12, comparison was made to small givers, those who have not been to Israel, and non-members of synagogues.			

Importance of Reasons to Donate to Jewish Causes

- Respondents were asked the following question: "On the whole, would you rather see more of the money collected by the Federation used for local Jewish needs or sent to Israel and overseas?" 39% selected local and 20% selected Israel and overseas. The possible answers "about equal," "whatever Federation thinks is best," and "as it is now" were not read to the respondent. 36% volunteered "about equal" as an answer. 4% responded "whatever Federation thinks is best" and 1% responded "as it is now."
- Respondents were asked if they feel more supportive of Israel, less supportive, or about the same as five years ago. 41% of respondents indicated they felt more supportive and only 5% felt less supportive. 54% did not change their level of support.

Implications and Recommendations

- The elderly is still the single most important "hot button." Federation needs to emphasize the role it plays in caring for the elderly in Dade County.
- Combating anti-Semitism is viewed as very important by 70% of respondents and Federation's role in community relations and its funding of defense organizations at the national level might be stressed.
- Respondents recognize the importance of providing a Jewish education to children. Federation should stress its role in funding Jewish education for children via the Central Agency for Jewish Education. Giving to Federation is higher among synagogue members and synagogues educate most of our children. If people were convinced to remain synagogue members to support the synagogue schools, they may also remain within the Jewish "system" and might continue to give to Federation. This finding also suggests that donors would look favorably upon more support by Federation of synagogue schools. About 80% of Dade County Jews belong to a synagogue at some point in their adult life.
- Support for the people of Israel is also a very important reason for giving. While the question was worded to avoid politics, note that the survey was completed while Shamir (Likud) was in office. Israel is a "hot button."
- While resettlement of Russian Jews may very well be a top agenda item of UJA and Federation nationally, it is quite clear that, while Jews in Dade County see this issue as important, it is not the most important issue.

Importance of Reasons to Donate to Jewish Causes

- No doubt, given the recent publicity on intermarriage and Jewish continuity from the National Jewish Population Survey, respondents are concerned about this issue. This is evident in the large percentage (70%) who indicate that Jewish education for children is a very important reason for donating to Jewish causes. On the other hand, recreational programs for children is rated as very important by only 43%. Apparently, respondents did not make the connection that recreational programs for children, such as Jewish day camps, are instrumental in encouraging children, particularly those in largely non-Jewish public school classes, to develop Jewish friendship circles. The development of such circles is critical not only in trying to maximize the chance that Jews will marry Jews, but also in maximizing the types of associations that promote Jewish philanthropy. In talking about Federation's support for such organizations as the JCC, Federation must make it clear to people that the JCC has a critical role to play with Jewish continuity, particularly among intermarried households.
- Stressing Federation's role in assisting Jewish elderly will probably be most successful with Pacesetters, elderly females, and givers in the \$100-\$499 range.
- Stressing Federation's role in assisting the elderly is a weaker argument with those under age 35 and married non-elderly households with no children present.
- The elderly is still the most important "hot button" for the Federation among all market groups.
- Stressing Federation's role in combating anti-Semitism will probably be most successful with those in the Northeast condos.
- Stressing Federation's role in combating anti-Semitism is a weaker argument with those under age 35, single non-elderly respondents, and Reform Jews.
- Anti-Semitism is still an important "hot button" for the Federation among all market groups.
- Stressing Federation's role in Jewish education of children will probably be most successful with Orthodox Jews, Pacesetters, and those donating over \$100.
- Stressing Federation's role in Jewish education will probably be a less successful argument with those not asked to give to Federation and Reform Jews.
- Jewish education for children is still an important "hot button" for the Federation among all market groups.

Importance of Reasons to Donate to Jewish Causes

- Stressing Federation's role in supporting the people of Israel will probably be most successful with the Northeast condo area, Orthodox Jews, Pacesetters, and those donating over \$100.
- Stressing Federation's role in supporting the people of Israel will be a less successful argument with those not asked to give to Federation, Reform Jews, and those age 35-49.
- Support of the people of Israel is an important "hot button" for the Federation among all market groups. Thus, continuing to stress the role of Federation in support of the people of Israel should prove productive. Although name recognition is high for Federation, many persons do not understand that Federation supports UJA. The Greater Miami Jewish Federation should continue to call itself "Federation /UJA."
- Stressing Federation's role in supporting Jewish Family Service will probably be most successful with North Dade residents, recent migrants, households with children, and Orthodox and Conservative Jews.
- Stressing Federation's role in supporting Jewish Family Service will be a less successful argument with Reform Jews.
- Support of Jewish Family Service counseling programs is not nearly as important as the factors discussed above, but this is still an important "hot button" for the Federation among all market groups.
- Stressing Federation's role in supporting preschools via support of CAJE and the JCC will probably be most successful with Orthodox Jews and those donating more than \$100 to Federation.
- Stressing Federation's role in supporting preschools will be a less successful argument with single non-elderly Jews.
- Support of Jewish preschool is not nearly as important as most of the factors discussed above, but this is still an important "hot button" for the Federation among all market groups.
- Stressing Federation's role in supporting resettlement of Russian Jews will probably be most successful with Pacesetters, Orthodox Jews, and those donating more than \$500 to Federation.
- Stressing Federation's role in supporting resettlement of Russian Jews will be a less successful argument with single non-elderly Jews.

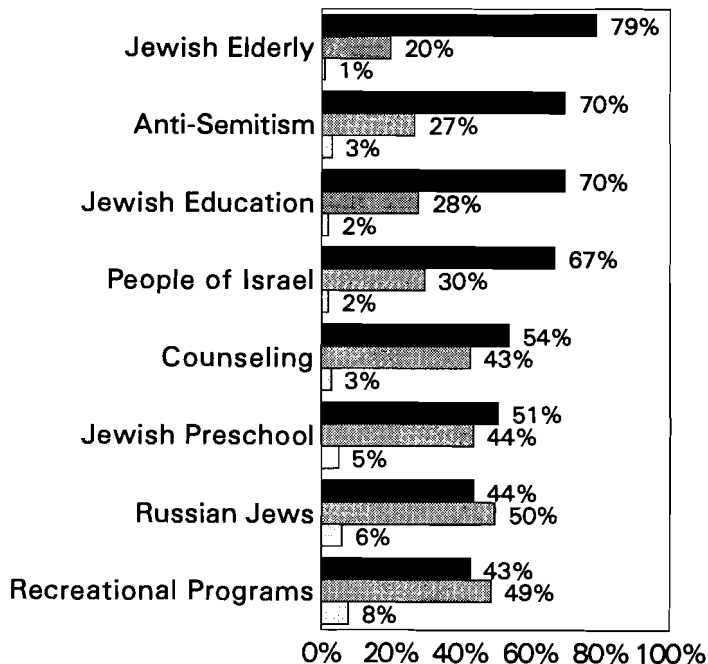
Importance of Reasons to Donate to Jewish Causes

- Support of resettlement of Russian Jews is not nearly as important as most of the factors discussed above, but this is still an important “hot button” for the Federation among all market groups. This is a critical finding, despite the fact that Operation Exodus was so successful in this community and the emphasis nationally on Russian Jews.
- Stressing Federation’s role in supporting the JCC and its recreational programs for children will probably be most successful with Pacesetters, the elderly, females, and those donating more than \$500 to Federation.
- Stressing Federation’s role in supporting recreational programs for children will be a less successful argument with single non-elderly Jews and Reform Jews.
- Support of recreational programs for children is not nearly as important as most of the factors discussed above, but this is still an important “hot button” for the Federation among most of the market groups. These programs probably need to be described to respondents in terms of their role in creating Jewish friendship circles for children.
- Miami has the highest level of perceived anti-Semitism of any US comparison Jewish community. Thus, the Greater Miami Jewish Federation need still be concerned seriously about anti-Semitism and should stress its role in dealing with the problem. Overall only 3% perceive no anti-Semitism at all in the Miami area.
- While the Jews in Dade County are supportive of the people of Israel, it is evident that only about one in five are supportive of sending the majority of Federation’s money overseas.
- Stressing Federation’s local allocation is most beneficial in South Dade, with recent residents, with those age 35-49, with households with children, with Reform Jews and the Just Jewish, and with those who have not been to Israel.
- Stressing Federation’s role with Israel will be most beneficial with Pacesetters and Orthodox Jews.
- It is clear from these results that the support of Dade County Jews for Israel has remained relatively immune from much of the negative publicity that Israel has received over the past decade.
- The 9% of those under age 35 and the 8% of those age 35-49 indicate a declining level of support for Israel should be a cause for some concern.

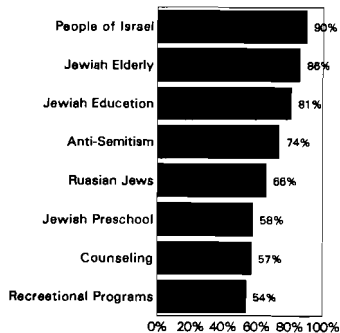
Importance of Reasons to Donate to Jewish Causes—Graphical Summary

Importance of Reasons to Donate to Jewish Causes

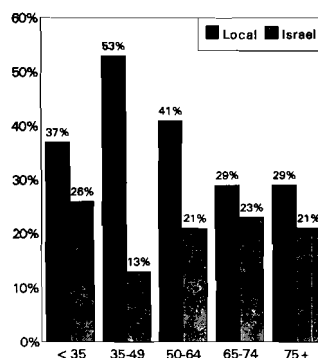
■ Very ■ Somewhat □ Not at All



% Very Important as Reasons to Donate to Jewish Causes for Pacesetters



Israel/Local Allocation by Age



Younger respondents are more likely to favor local allocation, particularly baby boomers

Statements About Federation

Factual Summary

Statements About Federation (Don't Know omitted)					
Statement	Strongly Agree	Agree	Disagree	Strongly Disagree	Total
More education is needed to strengthen people's bonds to Judaism	42.7%	53.5	3.8	.0	100.0%
It is easy to get involved with Federation	10.1%	66.7	20.0	3.2	100.0%
Federation interacts positively with givers BOTH before and after they give	6.9%	67.2	19.6	6.3	100.0%
Many people don't give to Federation because they can't give what is expected of them	7.0%	48.7	42.7	1.6	100.0%
Generally, people know what Federation does	6.1%	48.0	42.9	3.0	100.0%

Implications and Recommendations

- Stressing Federation's role in adult education should be most successful with Pacesetters, younger Jews, Orthodox Jews, and synagogue members.
- Dade Jews state a clear case for greater efforts at education. Adult education should result in greater levels of commitment to Judaism, which will in turn lead to greater levels of support for Jewish institutions.

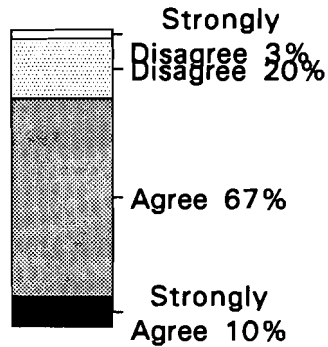
Statements About Federation

- These results clearly indicate that a significant percentage (23%) of people perceive Federation as an organization with which it is not easy to get involved. This is not the case for those with incomes over \$75,000 (11%) or those donating \$500 or more (6%). These findings, then, provide some indication that a reasonable portion of Dade County Jews of lower income perceive Federation differently than those of greater means. These results also indicate the need for better customer relations programs to make Federation a "friendlier" place so that more people will feel it easier to get involved.
- The existence of such a high percentage of disagreement with the statement "it is easy to get involved with Federation" in South Dade needs to be examined, especially given the existence of a South Dade office. The generally lower levels of religiosity and Jewishness in South Dade may help to explain this finding.
- That 24% of those age 35-49 disagree with the statement "it is easy to get involved with Federation," but such is the case for only 17% of those under age 35, may be due to some success of the Young Leadership Council.
- The results clearly indicate that a significant percentage (26%) of people perceive Federation as an organization which does not interact positively with givers both before and after they donate. This is not the case for single elderly, males over 65, respondents over age 75, and those in the Northeast condos. These results point to the need for better customer relations programs.
- That such a high percentage of disagreement with the statement "Federation interacts positively with givers both before and after they give" exists in South Dade needs to be examined, given the existence of a South Dade office.
- That high percentages of younger respondents disagree that Federation interacts positively with its donors is a matter of some concern.
- Federation should examine its procedures for interacting with its donors.
- That women disagree with the statement "Federation interacts positively with givers both before and after they give" to a greater extent than men needs to be analyzed by the Women's Division.
- The results clearly indicate that a significant percentage (55%) of people perceive that many people do not give to Federation because they can not give what is expected of them.

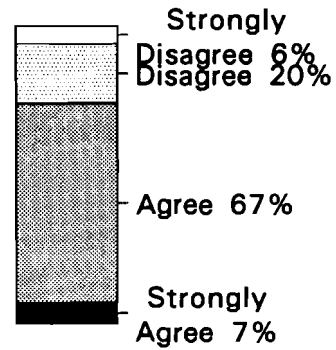
Statements About Federation

- That such a high percentage of agreement with the statement “Many people don’t give to Federation because they can’t give what is expected of them” exists in South Dade needs to be examined, given the existence of a South Dade office.
- That 40% of Pacesetters and 31% of those giving \$500 or more agree or strongly agree with the statement “Many people don’t give to Federation because they can’t give what is expected of them” is one of the most important findings of this study, because it is likely that the people they are thinking about in answering this question are probably people who are capable of giving reasonable sums of money.
- In spite of the fact that GMJF solicitors are taught to ask for a specific amount, it should be noted that this practice is cited by many as having a negative impact on their feelings about giving. This is particularly true for younger respondents. Better customer relations programs may be necessary to counteract any negative impact of these procedures.
- A significant percentage (45%) of people perceive that Dade County Jews do not know what Federation does. Large percentages of all market groups disagree that people in Dade County know what Federation does.
- This study has shown that 96% of Dade County Jews indicate that they themselves have heard of Federation. It has also shown that 38% of respondents are very familiar with Federation and 46% are somewhat familiar. Yet, almost half of respondents indicate that they do not feel that the Jewish community in general is familiar with what Federation does.
- That high percentages of younger respondents disagree that people know what Federation does is a matter of some concern.
- The results seem to indicate that Federation should examine its procedures for educating the Dade County Jewish public about its operations.

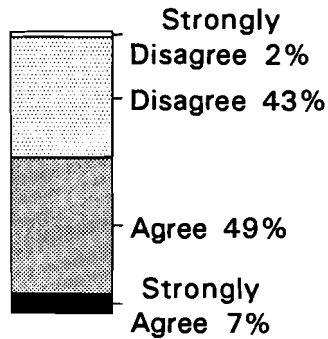
Statements About Federation



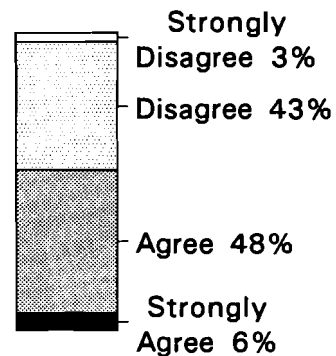
It is Easy to Get
Involved
with Federation



Federation Interacts
Positively with Givers
Both Before and After They Give



Many People Don't Give
to Federation Because
They Can't Give
What is Expected of Them



Generally, People Know
What Federation Does

The Solicitation Process

Factual Summary

•

Would You Be More or Less Inclined to Give to Federation if You: (Don't Know omitted)				
Action	More Inclined	Less Inclined	No Effect	Total
could designate the organization or agency to which Federation distributes your donation	60.2%	3.2	36.6	100.0%
are asked to give by someone you know well	59.1%	7.7	33.2	100.0%
are asked to give during an event or activity	46.2%	10.6	43.2	100.0%
are asked for a specific amount	9.6%	61.4	28.9	100.0%
are asked to increase your previous gift	6.4%	62.5	31.1	100.0%

Implications and Recommendations

• The Dade County Jewish public shows a clear preference for designative giving and Federation should strongly consider its institution. A "designation card" listing all of the agencies supported by Federation could be enclosed with each pledge card. Donors could be asked to select some number of agencies to be the recipients of their monies. The card should also explain how the Planning and Budgeting process works. All of this would be educational. The more organizations a potential donor sees on the card that he/she likes, the more likely they are to donate.

Chances are good that only a minority of donors would fill out the form. Thus, it is likely that the designated amounts would be below actual allocations. Just in case, the designation card should carry a statement that indicates that Planning and Budgeting, after studying the total campaign amount and the individual needs of agencies, may have to modify designations. An explanation of the composition of P & B should be included.

• That Pacesetters and givers over \$500 seem to favor designative giving is important.

The Solicitation Process

- The results indicate that attending an event can act as a motivating force for philanthropy. Events appear to be most popular with younger respondents, particularly younger women, households with children, and higher-income respondents. Women's Division, even more than Federation in general, should find events to be motivating factors.

- Events for Beaches residents should be less effective than in other parts of the county.

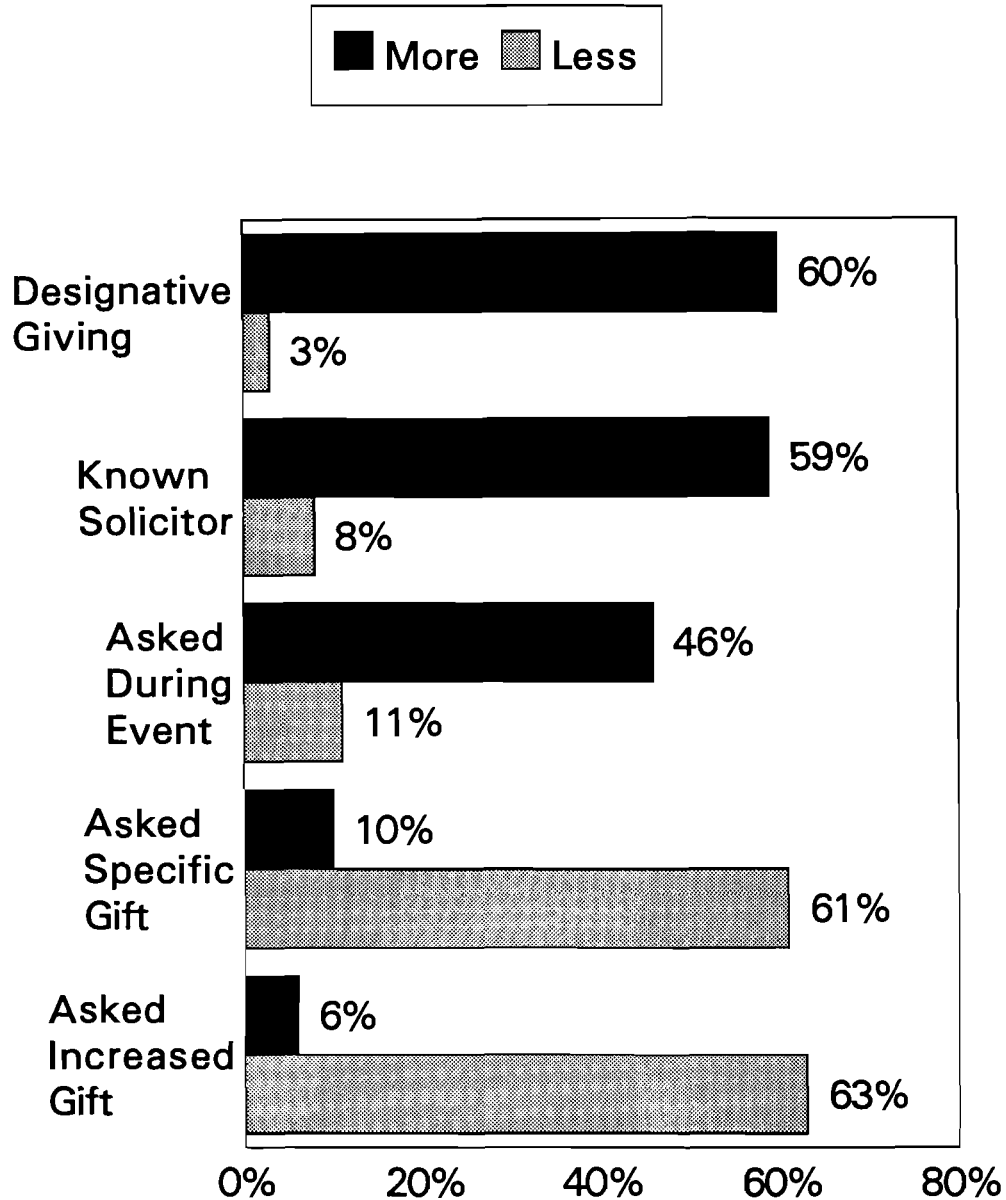
- The results indicate that asking respondents for a particular amount has a negative impact on large percentages of respondents in every category. This is particularly true for respondents under age 50, for Orthodox Jews, and for those who were asked to give, but declined to do so.

The Greater Miami Jewish Federation has always been careful to train solicitors (particularly on Super Sunday) to ask people to "consider a gift of ____." Once on the phone, however, or once a personal solicitation begins, Federation has little control over the exact wording used by solicitors. Federation sends out people to make thousands of dollars in "sales" with minimal training and needs to make certain that all solicitors understand the results of this survey and its implications for solicitation.

Better customer relations programs, including "holiday greeting" telephone calls with no solicitation of funds, may prove helpful in counteracting any negative impact an individual solicitor may have on any given donor.

- The results indicate that asking respondents for an increase has a negative impact on large percentages of respondents in every category. This is particularly true for respondents under age 50, households with children, and for those who were asked to give, but declined to do so.

Effect on Inclination to Give



Omits respondents indicating each action would have no effect on giving

Factors Influencing the Decision to Make Contributions

Factual Summary

Importance of Factors in Your Decision to Make Contributions (Don't Know omitted)				
Factors	Very Important	Somewhat Important	Not at All Important	Total
Knowing where the money goes	81.2%	17.4	1.4	100.0%
The purpose of an organization	77.2%	21.2	1.6	100.0%
Know the amount, regardless of size, will be appreciated	66.9%	23.9	9.2	100.0%
Understanding a specific agency's programs	62.9%	32.0	5.1	100.0%
The cause being one that personally touches you	52.8%	40.3	6.9	100.0%
How you were treated by the contacting person	51.7%	38.3	10.1	100.0%
The Jewish tradition of giving	46.2%	39.4	14.4	100.0%
Being involved in an organization or participating	28.4%	42.4	29.2	100.0%
Receiving some form of recognition	10.5%	25.5	64.0	100.0%

- 94% of donors to the Greater Miami Jewish Federation feel that their gift was properly appreciated.

Factors Influencing the Decision to Make Contributions

Implications and Recommendations

- The overwhelming majority of respondents want to know where their money is going. Federation should consider efforts to inform respondents more often of the agencies that Federation serves. "Customer relations" telephone calls could be used to thank respondents and to mention one or two places where the money is spent. This might be particularly useful if, for example, the phone call was made in a week where some of the money was used for an emergency purpose, such as saving Jewish children in what was Yugoslavia.
- Many of the techniques involved with establishing designative giving could act to inform donors about where their money goes.
- A "Where Does Your Money Go" card could be enclosed with each billing. Such a card would take one Federation program and briefly explain how the money is being used.
- The overwhelming majority of respondents feel that the purpose of an organization is very important. This is true for all market segments. These results argue that the Greater Miami Jewish Federation should make certain that potential donors understand the purpose of all of the organizations it funds.
- The overwhelming majority of respondents feel that knowing that the amount of their gift, regardless of size will be appreciated is very important. This is true for all market segments, but appears to be more important to younger respondents. These results argue that the Greater Miami Jewish Federation should make certain that "customer relations" methods are established to make certain that donors are made to feel that their gifts are appreciated.
- The overwhelming majority of respondents feel that understanding a specific agency's programs is very important. This is true for all market segments. These results argue that the Greater Miami Jewish Federation should make certain that potential donors understand the purposes of the agencies to which the Greater Miami Jewish Federation allocates its funds.
- The majority of respondents feel that the cause being one that personally touch them is very important in their decision to make a donation. This is true for all market segments. These results suggest that, when interacting with a potential donor who is known to have a favorite charity (perhaps due to an illness in their own family) that their priorities will probably lie with that charity. These results suggest that the Greater Miami Jewish Federation should take steps to try to make certain that potential donors are personally touched by the causes. Trips to Israel

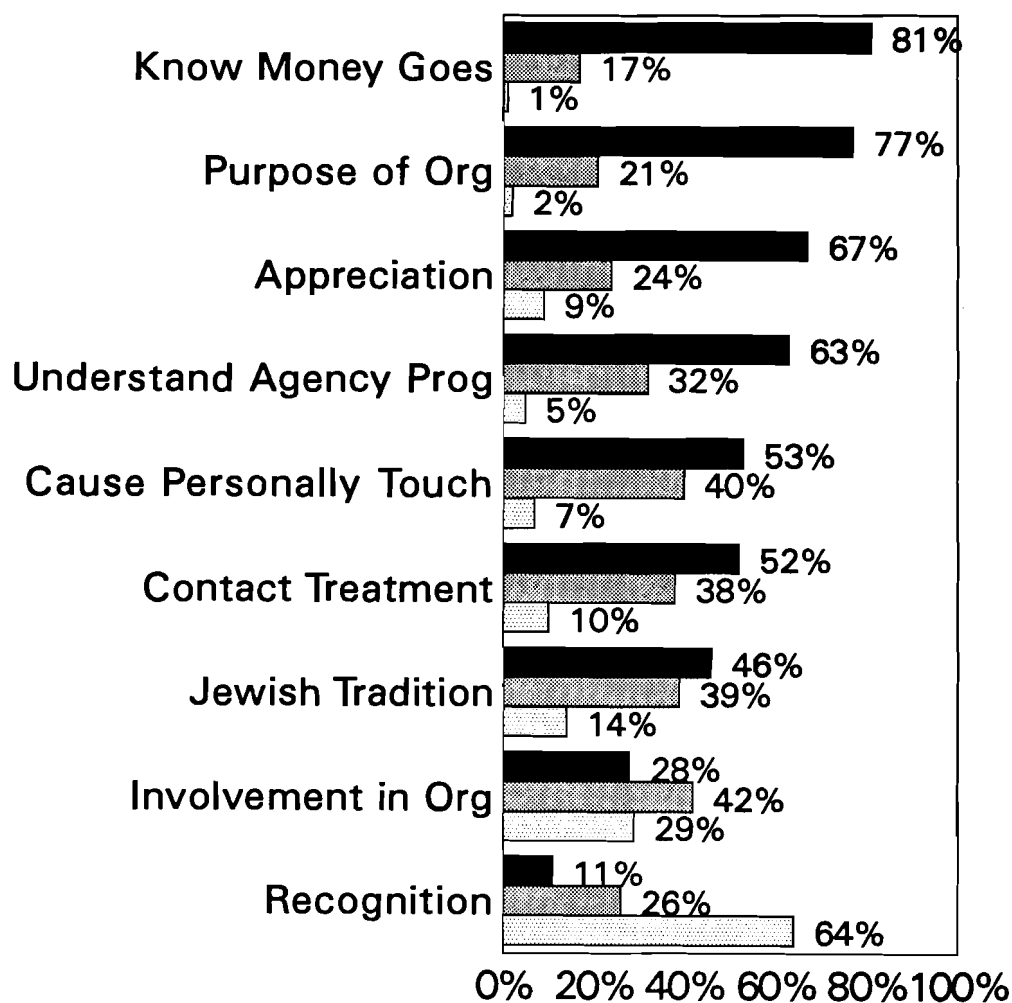
Factors Influencing the Decision to Make Contributions

and mini-missions to Miami agencies can help produce this personal touch. More importantly, establishing programs for potential donors to volunteer to a Jewish agency might prove effective. Federation might think about targeting persons who have given in the past, but not recently, with a request for voluntarism, rather than a request for funds.

- That the Jewish tradition of giving is “not at all important” to only 14% of the respondents is good news. On the other hand, only 46% suggest that this is a “very important” reason for giving. These *results* are very important. They suggest that, to a reasonably large portion of the community, one does not give to Jewish causes simply because one is Jewish and philanthropy is “required” by Jewish law. Rather, these results suggest that a good portion of the Jewish community views giving to Jewish causes as a completely voluntary activity. This put additional emphasis on the need to provide the Jewish public with information about the purpose of organizations and, via customer relations programs, with assuring that the solicitor/donor interaction is a positive experience.
- Apparently, large percentages of respondents feel that whether they are involved in an organization or not is not important in their decision to make a donation. That is, a significant population exists who want to give their money without getting involved and getting them involved, they say, would not change their giving decision.
- The Greater Miami Jewish Federation has always put a significant emphasis on giving recognition, particularly to large donors. The results seem to indicate that the receipt of some form of recognition is not an important factor in people deciding whether to make a donation to charity. This is true for 56% of Pacesetters and 58% of those giving \$500 or over. While these results do not argue for the abandonment of recognition programs (plaques, dinners, etc.) they do argue that other factors are much more important to the vast majority of the Dade County Jewish community. It is “appreciation” and not “recognition” that is the key word. Thus, customer relations programs, to let people know that their gift is appreciated, should be instituted.
- Apparently, Federation has done a good job at making people feel like their gift is appreciated, particularly given that Federation receives more than 19,000 gifts in an average year. While rates of appreciation are a bit lower for younger respondents and females these differences are not great. Most importantly, the results seem to indicate that, because most people already feel that their gift is appreciated, efforts to increase appreciation may not have the expected payoff.

Importance of Factors in Decision to Donate to Jewish Causes

■ Very ■ Somewhat ■ Not at All



The Print Media

Factual Summary

- 34% of Dade County Jewish households read *The Miami Jewish Tribune*. 52% of Pacesetters and 47% of GMJF donors read the paper.
- 16% of Dade County Jewish households read *The Dade Jewish Journal*.
- 7% of Dade County Jewish households read *4200*.

Implications and Recommendations

- About one-third of the Miami Jewish community claim to regularly read *The Miami Jewish Tribune*. This newspaper appears to be an effective way of reaching the Jewish community, particularly residents of The Beaches, married elderly, Orthodox Jews, Conservative Jews, synagogue members, those who have been to Israel, and larger donors.
- About 16% of the Miami Jewish community claim to regularly read *The Dade Jewish Journal*. Clearly, this newspaper is not as effective a way of reaching the Jewish community as is *The Miami Jewish Tribune*, particularly since it is not distributed in South Dade. This paper can be effective with residents of North Dade, married elderly, Orthodox Jews, synagogue members, those who have been to Israel, and larger donors.
- Only about 7% of the Miami Jewish community claim to regularly read *4200*. The apparent discrepancy between readership of the *Miami Jewish Tribune* and the *4200* insert calls for consideration of the format, frequency, and distribution methods of this publication.

Provisions in Wills

Factual Summary

- Respondents were asked the likelihood that they would make a provision in their will on behalf of the Greater Miami Jewish Federation. Overall, 3% replied very likely, 9% somewhat likely, and 88% not at all likely.

Implications and Recommendations

- Only 12% indicate any likelihood of leaving money in their will to the Greater Miami Jewish Federation. Many persons will not be leaving money to charity at all, but rather to their heirs. Maximization of bequests may take additional publicity about the Foundation of Jewish Philanthropies.

Some Overall Conclusions

1. The Greater Miami Jewish Federation must embark upon a major program to establish better "customer relations."

The results of this study strongly promote the idea that the Greater Miami Jewish Federation must establish a major program to interact more positively with its donors. The manner in which donors are treated is clearly important to donors.

A significant percentage of people perceive Federation as an organization with which it is not easy to get involved and which does not interact positively with givers both before and after they donate. In spite of the fact that GMJF solicitors are taught to ask for a specific amount, this practice is cited by many as having a negative impact on their feelings about giving. This is particularly true for younger respondents. Better customer relations programs (including "holiday greeting" telephone calls) may be necessary to counteract any negative impact of these procedures, to let people know that their give is appreciated.

2. The Greater Miami Jewish Federation must embark upon a continuing effort to improve the quality of solicitation.

Too often, solicitors are sent to contact donors with little training. The nature of this contact is shown by this study to be very important. Asking for increases in the previous gift and asking for a specific amount appears to have a negative impact upon respondents. Giving simply because one is Jewish and it is the "Jewish thing to do" is an attitude that is not as pervasive in the Jewish community as it once was. "Recognition" of one's gift is not as important as donors feeling that their gift is "appreciated."

3. The Greater Miami Jewish Federation must embark upon a program to educate Jews about the Federation and its agencies.

The Jewish public has name recognition of Federation and claim to be at least "somewhat familiar" with Federation, but many of the results point to the need to educate people about the workings of the Federation.

Some Overall Conclusions

- 4. The Greater Miami Jewish Federation should consider the institution of designative giving.**

Designative giving is shown by the survey to be an idea which might "pay off" in both increased giving to Federation and which can also act as a way of educating people about the nature of Federation.

- 5. The Greater Miami Jewish Federation must embark upon a program to get as many people as possible to Israel.**

Trips to Israel have a significant positive impact upon philanthropic activity.

- 6. The Greater Miami Jewish Federation should embark upon a program to unite the Jewish community.**

Synagogue membership has a significant positive impact upon philanthropic activity.

- 7. Synagogue members, baby boomers, and those in the Northeast condos represent the most significant markets for the Greater Miami Jewish Federation.**

- 8. The Greater Miami Jewish Federation must embark upon a continuing long-range strategic planning process.**

The Jewish community in the United States is changing in many significant ways and Federation must monitor and prepare itself for these changes. The first step is to establish a long-range strategic planning process. The 1982 demographic study is now more than ten years old and an up date of this study is essential to any planning process. The current study needs to be repeated at regular intervals. Certain market segments may be isolated for further questioning.