

# Memphis Jewish Federation

COMMUNITY NEEDS ASSESSMENT FINAL REPORT  
DECEMBER 2014



Consilience Group, LLC

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

## Table of Contents

I. Overview .....	2
II. Major Findings.....	4
III. Recommendations for Priority Resource Investments.....	12
IV. Recommended Next Steps .....	15
V. Source Material.....	17

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

## I. Overview

The Memphis Jewish Community Needs Assessment was an effort spearheaded by the Memphis Jewish Federation. The expressed purpose was to raise community awareness and deepen the collective understanding of the present and future needs of the Memphis Jewish community. The findings will be used to define the strategic priorities of the newly consolidated Federation/Foundation to be named Jewish Community Partners and provide guidance for how financial and human resources are allocated. Additionally, information that will be helpful in planning efforts will be shared to Memphis' synagogues, schools and agencies.

To help guide this process a Steering Committee of 19 individuals was established and Chaired by Cindy Finestone, Vice President, Needs Assessment and Allocations for Memphis Jewish Federation. The Committee was convened at key stages of the process to review information gathered as well as provide strategic guidance.

Bluma Zuckerbrot-Finkelstein, Director, Planning, Community Relations, Israel & International Affairs led the process on behalf of the Memphis Jewish Federation. She was supported in a variety of capacities by the combined staff of the legacy organizations Memphis Jewish Federation and the Jewish Foundation of Memphis.

The Community Needs Assessment was comprised of the following four components, which culminated in the development of the overarching findings and recommendations presented in sections II and III of this report.

### A. Development of a Strategic Framework

The strategic framework offers a lens through which to view the qualitative and quantitative findings. It was developed through visioning workshops conducted with the combined boards of the Memphis Jewish Federation and the Jewish Foundation of Memphis as well as the members of the Community Needs Assessment Steering Committee. This vision was vetted more broadly through the administration of a brief survey open to the community to which there were 244 responses.

The final strategic framework articulated the following visions: A vibrant and sustained Memphis Jewish Community. This is supported through the following three “levers”: Jewish identity and engagement; connectedness and a community that is cared for at all stages of life. There was also a recognition that needs vary across life stages as well as within specially defined populations that included individuals living in midtown and downtown, caregivers of older adults and parents of a child with special needs.

### B. Community Outreach and Communication

A critical component of the Community Needs Assessment process was the proactive outreach to key community stakeholders as well as members of the broader Memphis Jewish community with the expressed purpose of building awareness around the

# Memphis Jewish Federation

## Community Needs Assessment Final Report– December 2014

Community Needs Assessment process and encouraging participation across a broad cross section of the community. There was targeted effort to reach out to the unaffiliated and traditionally less engaged members of the Jewish community to better understand their needs and interests. Outreach and communication efforts included:

- Development of Memphis Jewish Pop brand
- Launch of an informational web page
- Development of a marketing and communications plan
- Outreach to agency and congregational leaders
- Outreach to major donors to update them on the Needs Assessment process
- Recruitment of participants for focus groups
- Recruitment of participants for community conversations
- Execution of community wide outreach and engagement to drive survey responses

### **C. Qualitative Information Gathering and Analysis**

Qualitative data was gathered to gain deep, nuanced information about community needs, perceptions and opportunities. The methods for gathering this type of information included the facilitation of three workshops, interviews with religious and agency leaders, twelve focus groups and three community conversations. In total these efforts encompassed feedback from over 200 individuals. To foster candidness individual responses were anonymized. The results of this phase formed the research questions used to design the quantitative analysis, described below. \*

*\*One issue identified during the qualitative phase that will require an in-depth technical feasibility study beyond the scope of this Community Needs Assessment is the long term sustainability of the two existing Jewish Day schools.*

### **D. Quantitative Information Gathering and Analysis**

Quantitative data was gathered to understand to what degree the insights gained from the qualitative efforts extended across the overall community. In addition, data was gathered to quantify the actual service delivery resources currently available in the community. These gathering efforts included the compilation of a resource map, led by the Memphis Jewish Federation and the administration of a community wide survey. The survey validated qualitative findings, gathered feedback from broader community, and collect measureable data that could be compared by demographic characteristics, particularly life stage. The survey was for open for one month and there were 1075 unique respondents. There was also a concerted effort to gather responses from older adults who may not be as online/technology savvy. As part of this effort volunteers made visits to Plough Towers, the Memphis Jewish Home and Rehabilitation Center and non-Jewish independent and assisted living facilities. Survey responses were analyzed independently and findings were integrated into the overall quantitative data.

### II. Major Findings

The major findings resulting from the Memphis Jewish community needs assessment are presented below. Supporting each finding is a table that identifies the sources of evidence (interviews, focus groups, community conversations, resource mapping and survey) for deeper exploration in Section V: Source Materials. The findings are organized according to the MJF Strategic Framework to foster a vibrant Jewish community – one that is *engaged, connected and cared for*.

Overall, results from the on-line survey validated the qualitative findings from interviews, community conversations and focus groups. If a finding is not backed up by sources from the mapping or survey, it generally indicates that a question relating to the evidence for that finding was not asked on the survey.

#### Engaged

- 1. The Memphis Jewish Community is highly engaged. Yet there are clear opportunities to broaden and deepen engagement, particular among young adults and mid/downtowners.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
A collective feeling that the Memphis Jewish community is vibrant and healthy.	✓		
Nearly all survey respondents report feeling connected to the local Jewish community.			✓
General recognition that Memphis offers robust resources for a community of its size.	✓	✓	
High levels (90+ percent) of engagement and participation in Jewish congregations and programming.			✓
Over half of survey respondents report participating in Federation-Sponsored events in the past two years.			✓
While a relatively high percentage of the overall community participated in the assessment, the majority of local Jews did not participate in needs assessment activities.			✓
Participation in Jewish activities among Downtown and Midtown Jews are lower than overall.		✓	✓
Congregational participation among Downtown and Midtown Jews and young adults are lower than overall.	✓	✓	✓

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

- 2. Local Jewish leadership is broad and inclusive. However, some representing nearly all stakeholder groups perceive exclusivity and concern about sustainability and community “succession planning.”**

Evidence	Interviews	CC/Focus Group	Mapping/ Survey
Perception that the local community could better tap and cultivate local leadership, particularly among young adults.	✓	✓	
Wide spread support of Jewish organizations through financial contributions and volunteerism, with over 500 people across the life stages serving as volunteer leaders.			✓
Perception that a small number of powerful people “run” the community.	✓	✓	
Perception that the future of the local Jewish community is inherently tied to the fate of Memphis, so attracting and retaining talent and families is critical.	✓	✓	

- 3. There is high appreciation for and participation in Jewish education, learning, cultural events and activities. The community wants expanded and diversified programming, particularly for specific sub-populations. Additionally, there are some questions whether Jewish programs are delivering a rich enough Jewish experience to justify the premium in cost.**

Evidence	Interviews	CC/Focus Group	Mapping/ Survey
High value placed on Jewish educational learning and its importance in establishing a feeling of Jewish connectivity and identity.	✓	✓	✓
Recognition of the rich exclusively-Jewish educational settings that meet a variety of interests/needs, but concern about the long term feasibility of sustaining these resources particularly the two separate Jewish Day schools.	✓	✓	
Significant youth participation in after school and extra-curricular activities and high satisfaction with the current offerings.		✓	✓
Desire for more Jewish cultural activities and events overall.	✓	✓	✓

# Memphis Jewish Federation

## Community Needs Assessment Final Report– December 2014

Some, particularly families with children, feel they often pay a premium for a “Jewish” service or activity, but the Jewish aspect of the experience is not as strong as they would like.		✓	✓
Concern among some parents that the Jewish pre-school experience is not offering a sufficiently comprehensive Jewish experience and environment.		✓	
While there is a desire for more and varied programming the majority of the community prioritized Jewish content over programming or services that are fully/exclusively Jewish.			✓
Services are missing for young people after Bar/Bat Mitzvah through 9 <sup>th</sup> grade to keep them connected to the Jewish Community before BBYO and other youth groups start.		✓	✓
Desire for more varied Israel programming and education opportunities.	✓	✓	✓
Interest in more geographically diverse programming and events (particularly located in Midtown and Downtown).	✓	✓	✓

#### 4. Successful engagement of local Jewish sub-populations will require targeted approaches to addressing barriers and meeting program needs.

Evidence	Interviews	CC/Focus Group	Mapping/ Survey
The two most prevalent reasons cited for not participating in Jewish programming was that programming was not of interest and inconvenience related to the time of day.			✓
Feedback from youth in their late teens is relatively limited, which makes it difficult to identify relative engagement levels of this sub-population and potential barriers.		✓	✓
Expressed concern around inherent challenges engaging the millennial generation.	✓	✓	
Midtowners and downtowners want more geographically accessible activities.		✓	✓
Affordability of services is a particular concern for young adults and families caring for a special needs adult or child.		✓	✓
Individuals caring for a special needs adult or child indicated feeling isolated from the broader community and a level of discomfort when attending		✓	✓

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

certain Jewish programming.			
The majority of individuals caring for a special needs adult or child indicated Jewish programming did not meet their child’s specific needs.			✓

## Connected

- 5. There is high interest and support within the overall community for greater connection and collaboration across local congregations and Jewish sub-populations.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
Desire for events to be organized for the broader Jewish community as opposed to having competing events at different congregations.	✓	✓	✓
Need for a neutral location for convening.	✓	✓	
Expressed interest among religious leaders to meet with peers, share information, and coordinate.	✓		
Expressed interest among agency leadership for cross-agency coordination and communication.	✓		

- 6. There are relatively high levels of participation in Israel travel and local Israel-related programming. At the same time, there are mixed perspectives on the size of funding allocation for overseas programming, including Israel-related activities. There appears to be an opportunity to deepen the sense of connection to Israel for particular sub-populations through programming that explores multi-facets of Israel.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
High levels of participation in Israel programming and travel.			✓
Expression among a subset of individuals that a disproportionate amount of funding is being sent overseas when there are clear and unmet needs within the local Jewish community.	✓	✓	
Sense among religious leaders that there is a strong connection to Israel and a feeling that there is an array of programs to foster this connection.	✓		
Desire to explore multi-faceted aspects of Israel, especially among young adults.	✓	✓	✓



# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

- 7. Participation in organized Jewish social and professional events that foster individual connections is relatively low. People want more targeted social activities that appeal to “communities of interest”, as well as enhanced professional connections.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
Relatively low reported participation in existing Jewish social events, with lack of interest in the offerings being the primary reason.			✓
High desire for social activities that bring together Jews who that share a common characteristic or interest (e.g. similar age or life stage such as mature adults and/or singles, sexual orientation, hobby or interest area)	✓	✓	✓
Need for formal welcome and engagement process for Jews moving into the area.	✓	✓	✓
Need for formalized business mentorship programs focused on young adults.	✓	✓	✓

- 8. There is a high need for centralized communications that provide a coordinated view of Jewish activities, events, and services.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
Respondents get information on Jewish life from a wide range of sources, though there is no one centralized source.			✓
Interest in having a “go to” information and referral portal for all Jewish related events and activities.	✓	✓	✓
Selected sub-populations, such as those needing social services, want a “one stop shop” source for resources.	✓	✓	✓
Preferred information channels vary significantly according to age. The Hebrew Watchman as well as Family and Friends are the two primary information channels, but the majority of young adults rely primarily on social media.		✓	✓

### Cared For

- 9. The greatest expressed service need across the overall population is help accessing and coordinating existing social services, both Jewish and non-Jewish. There is; however, a need for targeted expansion of social and human services that incorporate Jewish content and programming, as noted in the remaining Cared For findings.**

Evidence	Interviews	CC/Focus Group	Mapping/ Survey
The Jewish community should not be replicating/duplicating services infrastructure that already exists through other social service systems.	✓	✓	
There are relatively few local Jews making use of counseling services provided by a Jewish organization. Most access services through private practice or non-Jewish resources.	✓		✓
Religious leaders are often called upon to address behavioral or mental health issues, but don't always have the proper training and/or skills to effectively address these needs.	✓	✓	
There are privacy and confidentiality concerns about accessing services directly from a local "Jewish" organization.	✓	✓	✓
It would be helpful to have one central number or information point within the Jewish community that can help people get connected to needed services.	✓	✓	✓
The overwhelming majority of community respondents indicated an interest in seeing more Jewish content infused into social services.			✓

- 10. When dealing with a challenging life situation many Memphis Jews are looking for Jewish peer to peer counseling and support groups that incorporate a Jewish perspective.**

Evidence	Interviews	CC/Focus Group	Mapping/ Survey
Expressed need and interest for Jewish counseling services related to grief, addiction and other support groups that reflect Jewish values and beliefs.	✓	✓	✓
Due to lack of available offerings among the Jewish community, individuals/families have pursued other support and counseling groups offered through	✓	✓	

# Memphis Jewish Federation

## Community Needs Assessment Final Report– December 2014

Christian resources; however, they don't always feel comfortable participating or feel that the group is fully meeting their need.			
--	--	--	--

**11. There was priority given to aging related services that incorporate Jewish content and/or is reflective and sensitive to leading a Jewish life, as opposed to services being delivered by an exclusively Jewish organization. As part of this there was a clear need for targeted services to the large number of individuals aging at home and their respective caregivers.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
The vast majority of community respondents indicated that it was more important that aging related services including assisted living, long term care, adult day care, Aging in Place, and support for homebound seniors incorporate Jewish content and programming as opposed to offering an exclusively Jewish experience.			✓
Some expressed interest in the establishment of an exclusively Jewish assisted living facility and hospice services, but there was lack of consensus as to whether the community can support this service.	✓	✓	✓
A large number of aging adults appear to live in private residences either independently or with a family member.			✓
Older adults living in Jewish aging facilities such as Plough Tower or the Memphis Jewish Home and Rehabilitation Center are relatively well connected to support services.	✓	✓	
A low percentage of seniors are utilizing formal Jewish transportation services due to unreliability and service limitations. There is an expressed need for transportation to doctor's appointments, the grocery store and other errands.		✓	✓
Older adults don't often recognize their increasing need for assistance with daily living needs, as evidenced by the relatively low number (24) of survey respondents who self-identified within this category, and as a result this group is not fully utilizing available resources.			✓
An expressed desire among caregivers of seniors for additional support, including social support and as well as assistance navigating complex benefit systems.		✓	✓

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

- 12. While there is a relatively small number of Jewish families who identify as having children with special needs these families have unique service needs and could benefit greatly from targeted services.**

Evidence	Interviews	CC/Focus Group	Mapping/Survey
Expressed need for a resource coordinator/navigator who can help families with special needs children connect to and access the range of services available.		✓	
Expressed need for fund to underwrite services for special needs kids and adults. Medical bills are very costly and treatments and services are not always paid for through health insurance and publicly funded benefit programs. Families often have to self-fund these costs.		✓	
Interest in a support group and peer network for special needs families.		✓	✓

### III. Recommendations for Priority Resource Investments

The results of the needs assessment provide guidance to how Jewish Community Partners (JCP) can focus its resources to meet priority needs. In some cases, it will be appropriate for JCP to directly allocate funding or its own program support resources to these needs. In others, JCP can serve as a facilitator to assist other community resources (agencies and synagogues) to address these needs in the capacity they deem appropriate given their individual missions and mandates.

The following 9 implications define overarching “buckets” for priority investments. Each of these recommendations serve to foster a vibrant local Jewish community that is *engaged, connected, and cared for*.

#### 1. Sustain and build on services the community finds valuable

- Jewish education
- Cultural opportunities
- Israel travel and programming
- Diverse array of congregations that offer a full spectrum of religious, cultural, educational and social programs and services

#### 2. Expand and strengthen Jewish leadership experiences and opportunities, particularly for young adults

- Formal leadership “on-boarding” process
- Different types of leadership opportunities
- Targeted recruitment to potential leaders
- Build leadership capacity with on-going training, coaching and mentoring
- Partnerships with existing leadership organizations

#### 3. Coordinate communications and collaboration across congregations and organizations

- Central event repository for information on activities, events, and services
- Expanded communications methods to reach specific populations (e.g. apps)
- Organize information with different entry points (e.g. by lifestyle, profile, interests, etc.)
- Cross-congregational collaborative programs and services

#### **4. Expand/promote an array of Jewish programs and services for targeted sub-populations**

- Evaluate Jewish pre-school experience and identify opportunities to strengthen Jewish experience
- Evaluate programming for 7<sup>th</sup> and 8<sup>th</sup> graders and identify opportunities to strengthen the Jewish learning continuum
- Expand Jewish activities/programs hosted in Midtown & Downtown
- Increased diversity of Israel programming and educational opportunities
- Continue to consider and proactively address sustainability and efficiencies to ensure highest impact of programs and services

#### **5. Expand recruitment and retention activities for out-of-town and expat Jews**

- Identify opportunities to partner with talent recruitment initiatives focusing specifically on Jewish recruitment
- Expanded “Welcome Wagon” program for new comers
- Formal networking programs and professional mentoring for young adults

#### **6. Enhance Jewish social opportunities for specific sub-populations**

- Singles and widowed
- Mature adults
- Young professionals
- Lifestyle and interest groups (photography, the arts, fitness, LGBT, etc.)

#### **7. Expand comprehensive Jewish infused social, cultural and support services for individuals aging at home and the people who care for them.**

- Enriched, accessible cultural opportunities for seniors
- Social support for caregivers
- Expanded reliable, trusted transportation options for everyday needs

#### **8. Expand Jewish content and perspective in delivery of social services provided to the Jewish Community**

- Provide behavioral health and emotional support resources such as peer-to-peer support groups related to grief and loss, substance abuse, and addiction that incorporate a Jewish perspective

# Memphis Jewish Federation

## Community Needs Assessment Final Report– December 2014

- Partner with secular social service providers to incorporate Jewish content and/or incorporate a Jewish perspective for Jewish clients

### **9. Expand targeted social support and access to other resources for adults and children with special needs**

- Individualized navigation services to help families connect with array of resources
- Subsidy to aid with Jewish membership and/or programming costs.
- Peer network support groups

### IV. Recommended Next Steps

It is not expected that Jewish Community Partners (JCP) take responsibility for executing these recommendations directly. In the case of some recommendations they may be best positioned organizationally to lead the effort, but other recommendations will require that MJF play a coordinating and convening role working in partnership with other Jewish stakeholders to implement the recommendations.

Given this, following are recommendations for JCP next steps:

#### A. Maintain, Acknowledge and Celebrate Community Assets and Strengths

The needs assessment indicates many valued assets and strengths that create a vibrant, diverse local Jewish community. The MJF, as well as JFOM donors, have historically supported many of these assets. It is important that these efforts continue and are used as a foundation to address the unmet community needs and desires expressed in this assessment. It is also important that the community recognizes, appreciates and communicates its strengths to grow its positive self-identity as the foundation for retaining and attracting Jews to the local area.

#### B. Maintain and Build on Stakeholder Engagement

MJF has built momentum for community engagement through this needs assessment process. This should be leveraged as MJF announces its merged role as part of the JCP to promote robust community engagement:

- Roll out the general needs findings with clear connections to JCP structure
- Provide specific, immediate engagement opportunities as participants in a strategic planning process (see next bullet below); Transition the Needs Assessment Steering Committee to a Strategic Planning Steering Committee
- Provide targeted needs assessment findings to special interest groups to demonstrate added value of JCP as a community facilitator

#### C. Proactively Address Sustainability while Supporting Community Vision

The implications drawn from overall community input largely point to needed strategies for maximizing value to Jews already in the community. There is also a focus on retaining and attracting Jewish residents, particularly young adults. These implications were based on input from many stakeholder groups expressing concern about the shrinking local Jewish population.

Some community leaders advised that the realities of a shrinking population be more proactively considered in community infrastructure planning, both in terms of capital investments and operating efficiencies for large agencies and institutions. Efforts to retain and grow the local Jewish population are acknowledged as paramount; however, these leaders also emphasize the need to clearly understand and rigorously anticipate population and market trends when planning for resource



investments. Their guidance included the need to maximize efficiency without sacrificing commitment to community values, as well as being as realistic as possible about community willingness to access and/or pay for services.

It is recommended that these insights should be a key “lens” through which strategic planning and investment priorities are viewed.

### **D. Conduct Strategic and Implementation Planning**

Given limited resources, it would be unreasonable to expect that strategies to respond to community needs found in this report can or should be implemented simultaneously. For that reason it is imperative that the JCP’s strategic planning to identify short-, mid- and long-term priorities. Each recommendation will require an associated implementation strategy, including resources required, timeline, and key activities. Feasibility of implementation will be a key consideration in developing the strategic plan. Specific activities include:

- Establish metrics that guide priorities and demonstrate achievement
- Identify 2-3 “quick wins” that can be addressed within the next year to demonstrate momentum and effectiveness
  - The needs assessment findings imply that focusing on communication and coordination would be a likely “quick win” for the JCP
- Conduct deeper sustainability/efficiency analysis as needed, particularly those with long-term capital investment implications:
  - Examine sustainability and operating efficiencies of day schools
- Develop mid to long range plans
- Implement an accountability structure (transparent reporting)
- Institute of a process for continual needs identification and response

### **E. Align and Grow Resources targeted to Community Needs**

Strategies to respond to identified needs assessment implications will require resources to implement. In some cases the resources are currently available, but need to be better aligned for greater impact. Other strategies will require additional direct funding. This will require either changing historical campaign allocations or raising new funds either through the allocation process or aligned large donor giving. The targets for funding acquisition will be a critical output of the Strategic Planning process. Specific activities include:

- Assess current resources, both funding and human, as per the strategic plan
- Identify resource gaps
- Fundraise, recruit human resources, and invest according to strategic plan

# Memphis Jewish Federation

Community Needs Assessment Final Report– December 2014

## V. Source Material

### A. Visioning Work Sessions

- Federation
- Foundation
- Steering Committee

### B. Interviews

- Rabbis
- Agencies

### C. Community Conversations

### D. Focus Groups

### E. Survey Analysis

### F. Resource Map