



Results of Survey of Families with Young Children

Fall 2016

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Introduction

In Summer 2015, the Jewish Federation of Ottawa (Federation) and some visionary philanthropists came together to explore how to better engage young Jewish families with the community. Understanding the importance of engaging children when they are young and beginning their educational journey, an initiative was created by Federation and funded by these visionary philanthropists to launch the largest-ever community study of parents with children aged 0-6 who are raising their children Jewish in Ottawa. The goal was not only to understand who they are (where they live and how they identify), but how they view the community, how they perceive the Jewish organizations that they participate in, how they perceive central Jewish organizations, and what are some of the barriers to greater participation. With this knowledge, Federation and local Jewish organizations can better understand the preferences and needs of young families to effectively engage them in meaningful ways in the community.

Methodology & Process

In October 2015, Federation acquired the services of Measuring Success to help design and implement the survey. Measuring Success is a research firm that provides cutting-edge data solutions to foundations and non-profits, and has worked with hundreds of Jewish organizations across Canada and the United States.

Two senior consultants from Measuring Success came to Ottawa in December 2015 to conduct focus groups with local Jewish organizations, Federation leadership, parents with young children, and the funders. Their main objectives were to better understand the community, as well as collect the perceived barriers to participation for young families to engage with the Jewish community. These “hypotheses” allowed Measuring Success to design a survey to test if these perceptions were true or not, with the intent to help Jewish organizations understand how to engage local Jewish families.

Measuring Success, in conjunction with Federation, designed the survey between January and March 2016, as well as undertook a project to identify families in Ottawa who are raising their children Jewish and have at least one child born in 2010 or later. Based on extrapolations from the 2011 National Household Survey, there are an estimated 600 families who met these criteria.

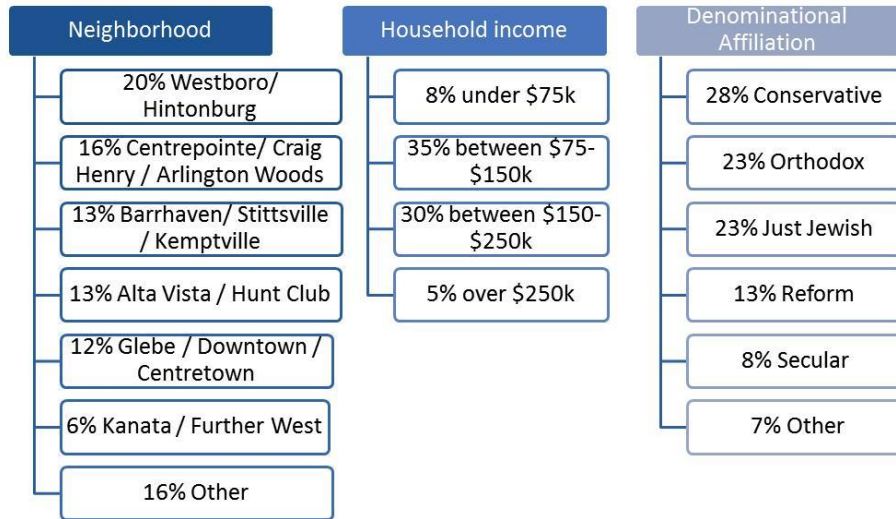
Federation staff identified 13 “key connectors” from different demographics, geographic areas, religious affiliations, and backgrounds to identify families who they personally know and could ask to complete the survey. This exercise, as well as including Federation’s PJ Library families, yielded a list of 415 different families who could be invited to participate in the survey, representing roughly 70% of the target demographic.

The survey was launched in April 2016 and was live for three weeks. Each of the 415 families received a personalized message from their “key connector” asking them to complete the survey, and this yielded 222 responses. In addition, Federation sent an email to its entire mailing list, purchased Facebook ads, and asked local Jewish organizations to promote the survey. These efforts yielded an additional 100 responses, for a total of 322 individual responses to the survey, representing approximately 295 households – a 50% response rate of eligible households in the target demographic!

Survey Results

Family Demographics

The survey reached a wide variety of families as can be demonstrated in this breakdown:

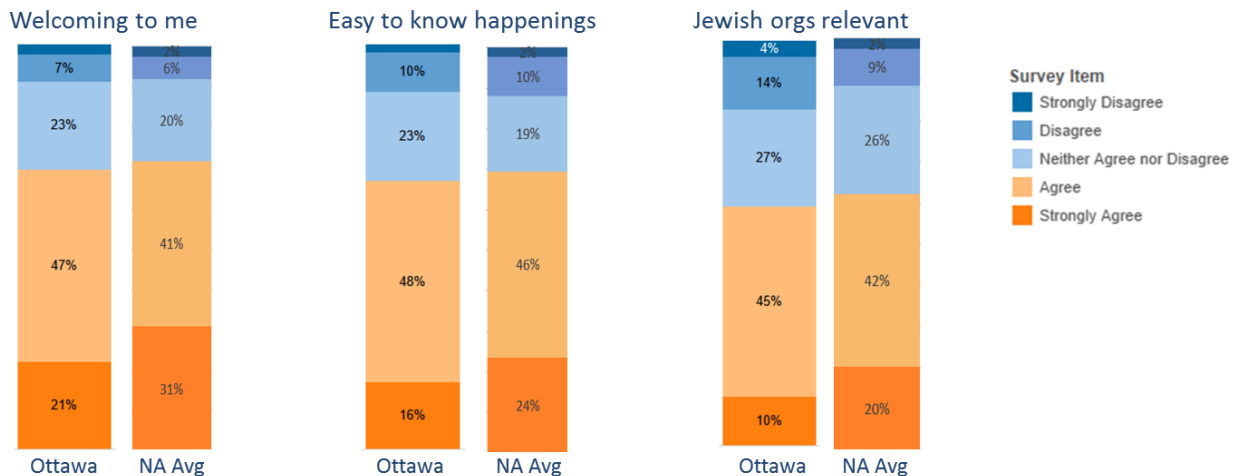


The demographics show that Jewish families are spread throughout Ottawa, without a single area significantly higher than others. An interesting result is that the denominational affiliation of “Just Jewish” was tied for second highest at 23% of families, only slightly behind “Conservative” at 28%. Denominational affiliation represents how people self-identify Jewishly.

General Results

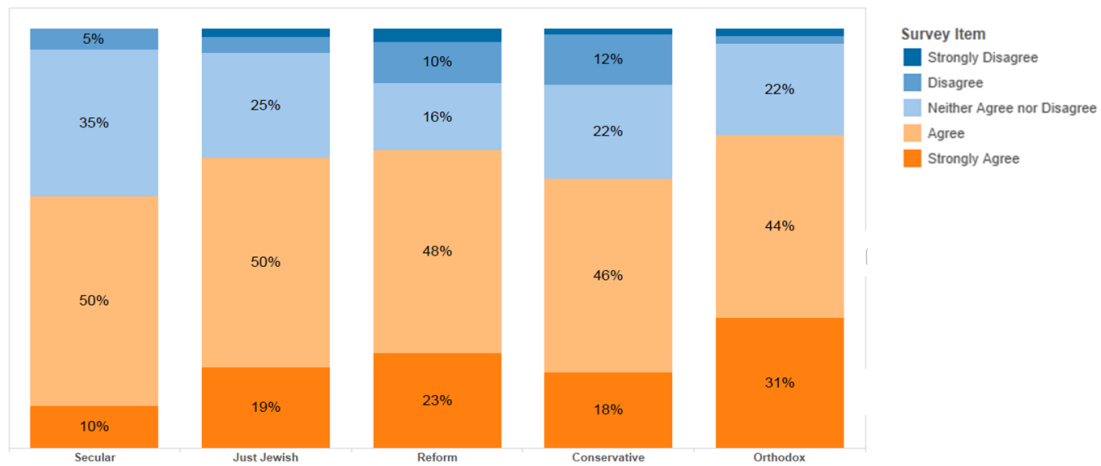
Attitudes toward Jewish Community, all respondents

% Distribution (n=270) comparing Ottawa with young families in Toronto, Chicago, and Dallas



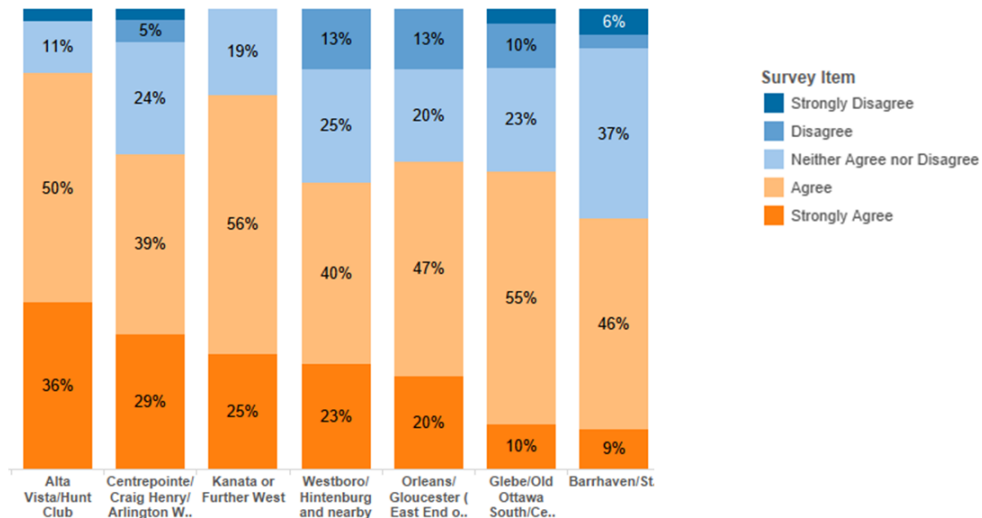
Jewish Community is Welcoming (by Religious Affiliation)

% Distribution



Jewish Community is Welcoming (by Neighborhood)

% Distribution



Key Take-Aways:

- Ottawa is below the North American average when parents were asked the extent to which they would agree with the following statements:
 - “The Jewish community is welcoming to me”
 - “I find it easy to know what is happening in the Jewish community”
 - “I find Jewish organizations relevant to me”
- Parents who identify as Orthodox feel the most welcomed, and parents who identify as “Secular” feel the least welcome (similar trend to other North American communities)
- Alta Vista/Hunt Club residents feel most welcomed by Jewish community, while Barrhaven/Stittsville/Kemptville feel the least welcomed

Introduction to Results of Local Jewish Organizations

Perceived quality of local Jewish organizations was measured using the “Net Promoter Score”, by only asking recent and current participants if they would recommend their organization to a friend. Based on a five point scale, survey respondents selected one of “Strongly Agree”, “Agree”, “Neither Agree nor Disagree”, “Disagree”, or “Strongly Disagree”. Those in the lower three categories are called “Detractors” and negatively impact the perception of the organization. Those who select “Agree” are considered to be passively satisfied, and those who select “Strongly Agree” are considered to be “Promoters”. The key difference between “Promoters” and those who are passively satisfied is that the “Promoters” are typically individuals who are spreading the word about how an organization is great. The higher percentage of “Promoters” – those who selected “Strongly Agree” – the higher the perceived quality of the organization.

Measuring Success has conducted similar surveys and provided benchmarks – average “Promoter Scores” – from across North America that have been included with the results below.

The percentage of Promoters relative to a benchmark is not meant to evaluate “good” vs “bad” organizations, but rather to be used as a baseline for improvement. For example, if an organization has 20% Promoters and comparable organizations have a benchmark of 40% Promoters, it knows that it has room for growth and has a baseline to determine if Promoters are increasing if the question is asked to its constituents again in the future.

In addition to understanding the perceived quality, the survey also tested the idea of how financial incentives might affect enrollment and participation in each type of Jewish organization, and the results are shared below. In the questions posed to survey respondents, a heavy financial incentive typically was offering a Jewish experience for free, and a partial financial incentive was typically offering a discount of approximately 50%.

Please note that the results below indicate the scores of each organization without identifying them by name. The names of the organizations that were options for respondents are included (alphabetically), but due to confidentiality, are not linked to the individual scores. They were shared with the leadership of all of the relevant organizations.

Perceived Quality of Federation



Key Take-Aways:

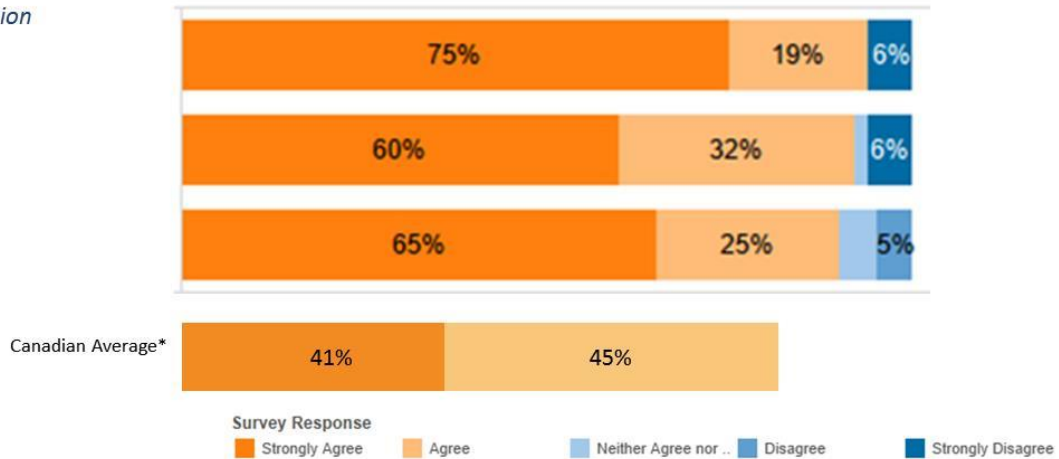
- The North American benchmark for Federations is mid-30s % “strongly agree”.

Perceived Quality of Jewish Preschools

Likelihood to recommend preschool from parents whose children attended in past 3 years

Ottawa Jewish Preschools: Early Beginnings, Ganon, Westboro Jewish Montessori Preschool

% Distribution



Key Take-Aways:

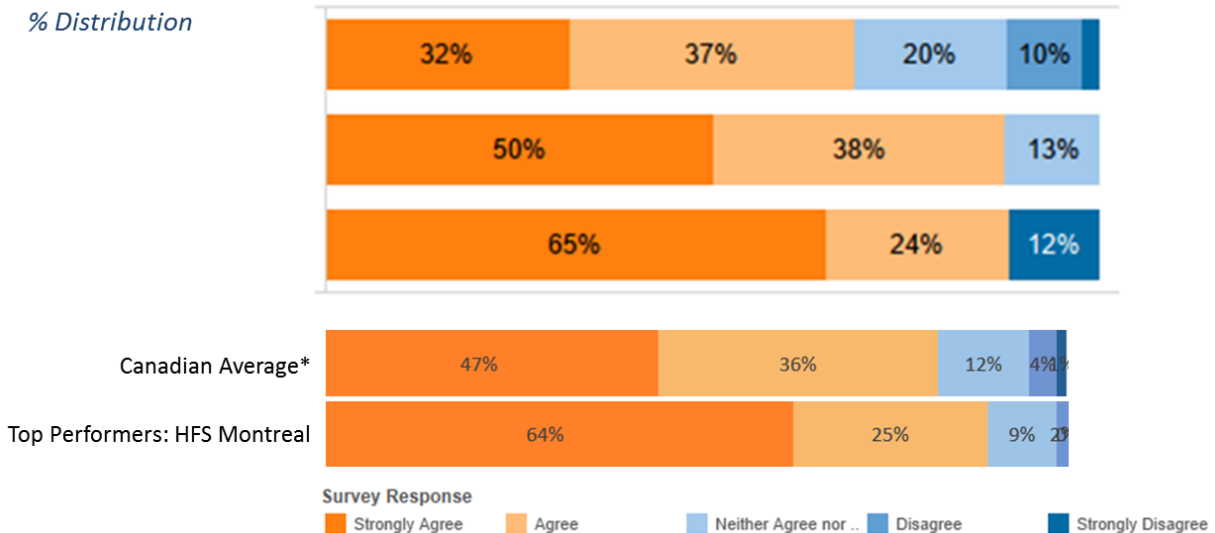
- Promoter range of 60% to 75%.
- All three pre-schools are above the Canadian average of 41%.
- Financial incentives for Jewish preschools were not explored in this survey.

Perceived Quality of Jewish Day Schools

Likelihood to recommend school from parents whose children attended in past 3 years

Ottawa Jewish Day Schools: OJCS, Rambam, Torah Academy

% Distribution



Key Take-Aways:

- Promoter range of 32% to 65%.
- One school is above the Canadian average of 47%, one is statistically around the Canadian average, and one is below.

Impact of Financial Incentives for Jewish Day Schools

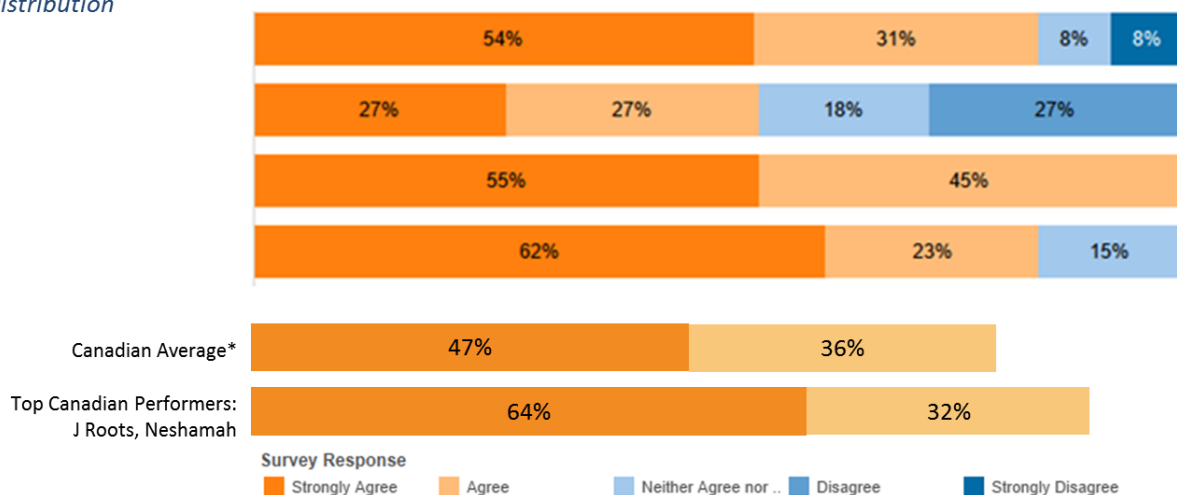
- A temporary heavy financial subsidy would yield a 38% increase per class, and a temporary partial financial subsidy would yield a 33% increase per class. The permanent increase once the subsidy is finished would be 10%, unless the school can demonstrate ongoing value during the subsidized years. The difference between a heavy and partial subsidy is relatively insignificant.
- The key demographics who are most likely to use the subsidy are families who haven't had any children attend Jewish day schools, non-Orthodox families, who attend Federation programming no more than annually, who say Judaism is "fairly important" as opposed to "very important", and who live in Westboro.

Perceived Quality of Jewish Supplementary Schools

Likelihood to recommend supplementary school among those that attend/ed

Ottawa Jewish Supplementary Schools: OMJS, OTC, Talmud Torah, Temple Israel,

% Distribution



Key Take-Aways:

- Promoter range of 27% to 62%.
- Three of four supplementary schools are above the Canadian average of 41%.

Impact of Financial Incentives for Jewish Supplementary Schools

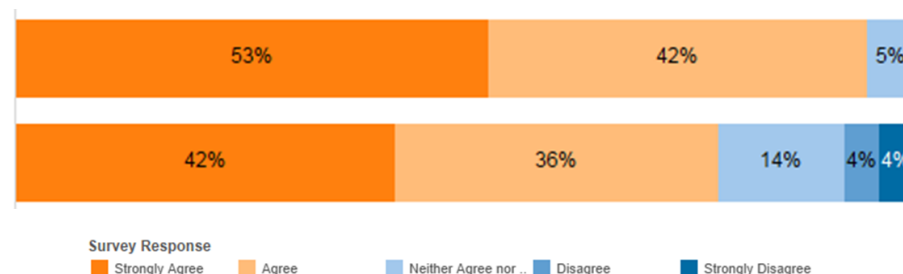
- Financial incentives had low impact to increase Jewish supplementary school enrollment. A temporary heavy financial subsidy would yield a 19% increase per class, and a temporary partial financial subsidy would yield a 6% increase per class. There would not be a permanent increase once the subsidy finishes, unless the school can demonstrate ongoing value during the subsidized years.
- Lack of priority and inconvenient location were the main barriers, not financial reasons.
- The key demographics who are most likely to use the subsidy are families who haven't had any children attend supplementary schools, non-Orthodox families, and families with a household income under \$150K.
- Note: since the survey, there have been some changes in the Ottawa Jewish supplementary school system, including two new Principals.

Perceived Quality of Jewish Day Camps

Likelihood to recommend camp from parents whose children attended in past 3 years

Ottawa Jewish Day Camps: Gan Israel, SJCC

% Distribution



Key Take-Aways:

- Promoter scores of 42% and 53% are above the Canadian average of 41%.
- Since this survey targeted families with a child aged 0-6, there were not enough responses about overnight camps to deem the results statistically significant and are therefore not included in this report.

Impact of Financial Incentives for Jewish Day Camps

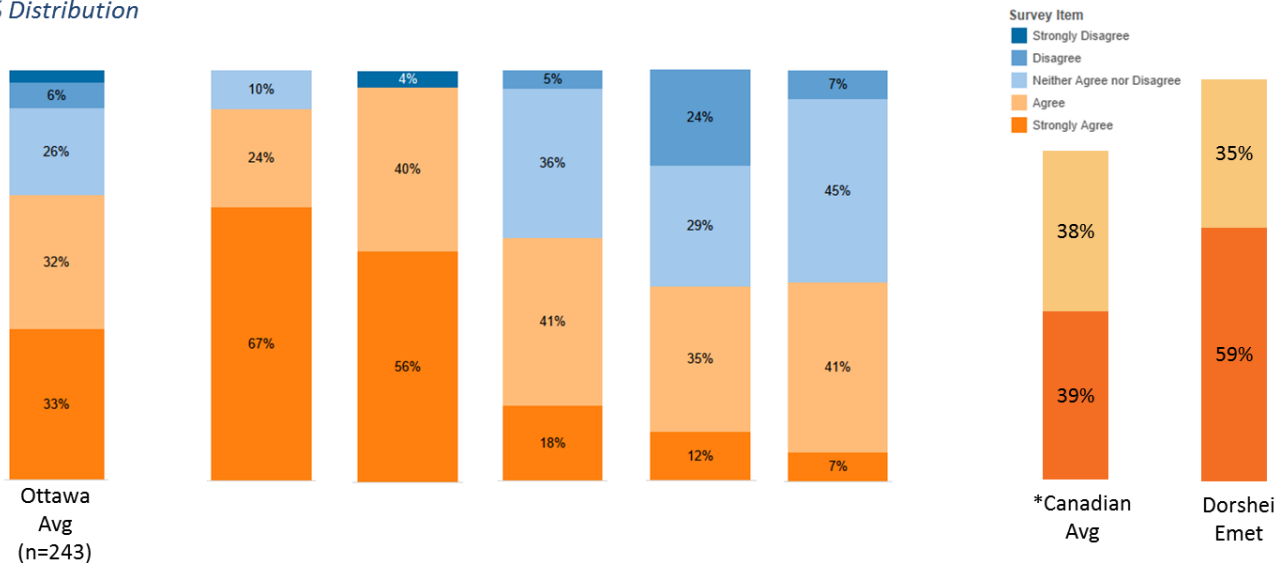
- A temporary heavy financial subsidy would yield a 40% increase per age cohort, and a temporary partial financial subsidy would yield a 10% increase per age cohort. The permanent increase once the subsidy is finished would be 5%, unless the camp can demonstrate ongoing value during the subsidized years.
- The key demographics who are most likely to use the subsidy are families who say Judaism is "fairly important" as opposed to "very important", and who are lower income.

Perceived Quality of Synagogues

Likelihood to recommend synagogue among current members (minimum 15 responses)

Ottawa Synagogues: Agudath Israel, Beit Tikvah, Machzikei Hadas, OTC, Temple Israel

% Distribution



The Ottawa average includes all Ottawa synagogues, not just the 5 with a minimum of 15 responses.

Key Take-Aways:

- Promoter range of 7% to 67%.
- Two synagogues are significantly ahead of the Canadian average of 39%, and three are behind.
- The synagogue with 67% Promoters is the new Canadian top performer!

Impact of Financial Incentives for Synagogues

- A temporary heavy financial subsidy would yield a 100% increase in membership of families with young children, and a temporary partial financial subsidy would yield a 26% increase. The permanent increase once the subsidy is finished would be 15%, unless the synagogue can demonstrate ongoing value during the subsidized years.
- The key demographics who are most likely to use the subsidy are families who say Judaism is “very important” as opposed to “fairly important”, who envision attending synagogue at least monthly, and who currently attend synagogue quarterly or less.

Impact of Financial Incentives for the Soloway Jewish Community Centre

- For SJCC membership, a temporary heavy financial subsidy would yield a 147% increase in membership of families with young children, and a temporary partial financial subsidy would yield a 100% increase. The permanent increase once the subsidy is finished would be 50%, unless the SJCC can demonstrate ongoing value during the subsidized years.
- The key demographics who are most likely to use the subsidy are families who say Judaism is “very important” as opposed to “fairly important” and who live in Westboro.

How the Results Have Been Used

In June 2016, the two senior consultants from Measuring Success returned to Ottawa and presentations of the results were offered to every Jewish organization in Ottawa (35 representatives attended), the Federation board, the “key connectors” who helped promote the survey, the parents who attended the December focus groups, and the funders. Over the summer of 2016, the survey results were shared at top donor briefings, and 15 custom reports were created for every Jewish organization in Ottawa listed in the survey with their specific results. These custom reports were presented to their leadership in face-to-face meetings by Federation’s CEO and Director of Community Collaboration to help them better understand young Jewish families in Ottawa and how to engage them successfully. In addition, a community-wide presentation took place in September 2016 targeting parents who completed the survey and open to the entire community.

Next Steps and Conclusion

The Jewish Federation of Ottawa’s mission is to advance and promote an exceptional quality of Jewish life, and engaging young Jewish families in the community is a priority. The results of this survey will be used by Jewish organizations and synagogues to understand the needs and preferences of parents today so that entire families can be engaged in the vibrant Jewish life of Ottawa. Federation will be using the results of this survey to develop financial and other incentive programs to entice parents to make Jewish choices and participate their children in the plethora of Jewish options in Ottawa. An immediate outcome of the survey was to work with the Ottawa Jewish Community School to implement a follow-up survey with parents and a financial benchmarking exercise, both conducted by Measuring Success. The results of both will allow the school to learn objectively where to focus its efforts in the areas that have been statistically proven across North America to attract young families to Jewish day schools. Federation will explore other organizations to partner with in its goal to involve young families in Jewish life in Ottawa.