

Deepening Our Understanding of East Bay Jewish Life

Revised
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RODAN FAMILY
FOUNDATION

www.rodanfoundation.org



Rosov
CONSULTING | Information
Insight
Impact

The **Rodan Family Foundation** was established in 2018 by Katie and Amnon Rodan and is based in the San Francisco East Bay. Funds are targeted to be spent down through 2035 in an effort to drive strategic, radical change within key areas of interest in the founders' lifetimes. One area of great interest is ensuring the next generation has a meaningful relationship with local Jewish life and community.

The East Bay is a center for innovation in Jewish life, and the Foundation is excited by the potential to harness this creative energy for a much stronger future. As the Foundation began this work, it was critical that any investments were rooted in data and not reliant on personal experiences. The Foundation engaged **Rosov Consulting** to build evidence for strategic, local investment in building the Jewish community of tomorrow in the East Bay.

Throughout this process, the Foundation focused its research and analysis on specific lifecycle moments, ones that they believe have the opportunity to create lifelong Jewish connection: from families with young children and early childhood education; to youth and teens; to college students; all the way to young adults on the verge of forming new families and homes of their own.

The Foundation is pleased to share the results of these efforts with hopes to spark important conversations around, and ultimately communal action toward, meaningfully enhancing East Bay Jewish life. In addition, the Foundation hopes that this work will serve as a model for other communities to understand, measure, and enhance Jewish communal engagement.

METHODOLOGY

To provide the Foundation with critical data and intel to drive strategy, over the past eight months a team from Rosov Consulting:

- ✔ Conducted extensive secondary data analysis of the 2018 ["Portrait of Bay Area Jewish Life and Communities"](#) to better understand the specific demographic traits of the East Bay.
- ✔ Interviewed 9 field experts working with demographic groups of interest.
- ✔ Interviewed professional leaders of 14 local organizations.
- ✔ Carried out a program "inventory" with 56 organizations serving East Bay Jews and their families ages 0-40. This represents approximately 73% of local organizations and all major players, therefore we believe that our findings accurately reflect the current state of the Jewish community in the East Bay.

KEY LEARNINGS

East Bay Jewish Population

With 33,000 Jewish households, East Bay residents represent the largest Jewish population in the Bay Area. More than half of all East Bay Jews live in Alameda County, a third live in Contra Costa County, and the remainder live in Solano County. While families with young children (ages 0-5), youth (ages 6-12), and teens are comparably split between Alameda and Contra Costa Counties, there's a significant difference when it comes to young adults: almost three times more young adults live in Alameda County than in Contra Costa County. (The sample of Solano County respondents in the Community Portrait is too small to make reliable estimates of the population size.)

One out of every four East Bay Jewish households includes a non-White member, and one out of every ten includes a lesbian, gay, or bisexual* member. A quarter of East Bay Jews report belonging to a synagogue, minyan, or chavurah, with many more of those in Contra Costa County (37%), than in Alameda County (21%). The East Bay has the lowest median income in the Bay Area, and East Bay Jews spend, on average, between 25-33% of their income on rent or mortgage (compared to the U.S. average of 20%).

East Bay Jewish Organizations

While the overall number of Jewish households is comparable across the two counties, the number of organizations serving these households is significantly lower in Contra Costa than in Alameda. We see a high concentration of innovative Jewish organizations like Wilderness Torah, Jewish Studio Project, and Urban Adamah providing direct services in Alameda (84% of all such organizations are based in Alameda) and a slightly heavier presence of Chabad in Contra Costa. Of note, in Alameda County 4,700 Jewish households with young children ages 0-5 are served by eight preschools, while 3,700 households in Contra Costa County are served by three. Serving similar size youth and teen populations across the two counties, there are double the number of organizations in Alameda compared to Contra Costa.

East Bay Jewish organizations employ almost 350 full-time professionals serving Jews ages 0-40. Organizational leaders report that it is challenging to recruit and retain qualified professionals, primarily due to the high cost of living in the East Bay and their inability to provide competitive salaries and benefits.

Two-thirds of organizations collaborate with each other by frequently sharing contact lists, social media posts, and events. Synagogues and Chabads tend to share less often. While almost all organizations collect contact information, gender, age, and basic satisfaction data from participants; fewer than 10% ask about race, sexuality, interfaith relationships, income, and the accessibility needs of their participants.

Major Themes

Capacity

For families with young children, the East Bay Jewish community hosts 12 preschools currently serving only 500 children in total. All are at full capacity. With more than 8,000 households reporting having young children between the ages of 0–5, only about 5% of eligible families are enrolling their young children in Jewish preschools (the national average is estimated at about 25%). With 67% of Jewish households in the East Bay comprised of dual working parents, only three of the 12 preschools offer infant/toddler care, and most are open only between the hours of 8 a.m. and 5:30 p.m. Many organizations offer other programs for families with young children, such as Jewish holiday programming, Shabbat programming, learning days, and support groups. While they serve about 25% of the eligible population, the vast majority can serve more and currently operate under capacity.

Presently, 15 supplementary school programs serve about 1,000 pre-Bar/Bat Mitzvah youth, and 10 schools serve approximately 500 teens (including 140 teens in East Bay Midrashot). All of these programs are operating under capacity. Youth and teens are also served by day and residential camps, youth groups, and other types of programs. Overall, these programs serve about 35–40% of all eligible youth and 25–30% of all eligible teens. The vast majority of these programs are operating under capacity, as well.

While Berkeley Hillel estimates about 2,500 Jewish students on the UC Berkeley campus, the sample of college-aged respondents in the Community Portrait was too small to make reliable estimates of the overall population size. We know that 24 organizations serve this population, and 80% of them report operating under capacity.

Out of 15,000 young adults in their pre-family years residing in the East Bay, market penetration stands at about 30%, and most programs serving this population are operating under capacity. This group is served not only by local organizations but also by chapters of national organizations like OneTable and Moishe House.

Diversity

According to the Community Portrait, one out of every four East Bay Jewish households includes a non-White member/Jew of Color (JOC), and one of every ten includes a member who identifies as lesbian, gay, or bisexual. Market penetration for these two sub-populations stands at around 20%. According to Portrait data, 83% of JOC report feeling welcome at community events, yet only 31% of them report feeling truly a part of the community. In a similar but slightly improved pattern, 82% of LGB Jews report feeling welcome in organizations and at events, but only 40% report feeling a part of the community.

Roughly 20% of East Bay Jews were born outside of the U.S., and two-thirds hail from outside the Bay Area. Approximately 55% of East Bay Jews are married/partnered; of them, 55% are in an interfaith marriage/partnership. Alameda County far outstrips Contra Costa County in the percentage of interfaith families (65% vs. 40%). Nearly 40% of all Jews living in the East Bay are single.

Geography

It is common knowledge and experience that the geographic contours of the East Bay make crossing county borders difficult: the distance and commute times are too significant for many people to take part in programs offered in a neighboring county. This is important as our program inventory revealed some unevenness when it comes to the geographic spread of organizations relative to residence among certain population groups.

As mentioned above, 4,700 households with young children ages 0–5 are located in Alameda County and 3,700 are in Contra Costa County—yet the former is served by eight preschools and the latter by three. Twice as many organizations serving youth and teens are located in Alameda County versus Contra Costa County, yet similar size populations of each exist in the two counties. The geographic spread of organizations to population are most aligned for the pre-family young adult population, where three times as many young adult Jews live in Alameda County (compared to Contra Costa County), and the majority of organizations serving this population are located in Alameda County as well. Despite the major discrepancy in organizational capacity, on average greater percentages of those who live in Contra Costa County report feeling welcome and a sense of belonging in the Jewish communal world (93% feel welcome and 44% feel like they are a part of a Jewish community).

The sample of Solano County respondents in the Community Portrait was too small to make reliable estimates of the population size. In addition, the number of Jewish organizations in Solano county is too small to compare with Alameda and Contra Costa Counties.

FOR FURTHER READING

Read on for more information about the East Bay Jewish organizational ecosystem and each age group studied.

Both the Foundation and Rosov Consulting hope these data will be helpful to all those who serve in the East Bay Jewish communal ecosystem and act as a means to catalyze strategic, data-driven conversations about how we all can continue to serve our evolving community.

* In the Community Portrait study, only the following options were included for the question about sexual orientation: "Heterosexual / straight," "Gay man," "Lesbian / gay woman," "Bisexual," "Other," and "Prefer not to answer."

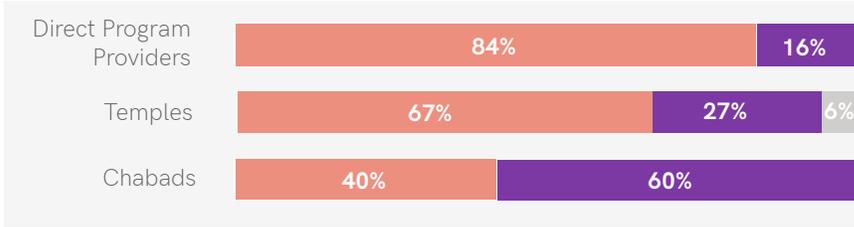
EAST BAY ECOSYSTEM

ORGANIZATIONS

Alameda (71%)



Contra Costa (27%)



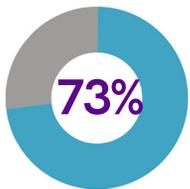
60% of all Jewish households in the East Bay are in Alameda County; 30% are in Contra Costa County; 10% are in Solano County

PROFESSIONALS

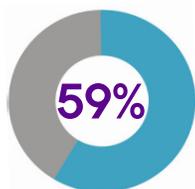
338

Full time professionals serving the demographic groups of interest

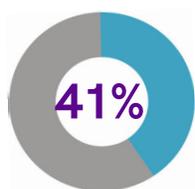
Organizations say:



It is challenging to identify and recruit qualified staff



It is challenging to retain qualified staff



It is challenging to provide appropriate professional development opportunities

Factors involved

- Limited pool of qualified professionals in the field
- Inability to provide competitive salaries
- High cost of living in the Bay Area

37% of organizations serving young adults provide programs exclusively for Jewish professionals

MARKETING

Social Media	98%
Word of mouth	96%
Listserve (email lists)	62%
Paid advertising (on social media)	57%
Printed advertising	51%

66% of organizations share contact lists, social media posts, and events with each other

CAMPS 100%

DAY SCHOOLS 100%

NATIONAL ORGANIZATIONS 88%

DIRECT SERVICE PROVIDERS 83%

TEMPLES

33%

CHABADS

20%

PARTICIPANT INFO COLLECTED



Names 96%



Gender 68%



Email 94%



Age 60%



Phone 89%



Marital Status 30%



Address 81%

Less than 10% of organizations gather data on: race, accessibility needs, income/SES, and sexuality.

FEES & COSTS



75% OF THESE → 75%

organizations charge a fee for their programs

say this fee covers at least half of cost per participant

Families with Children Ages 0-5

Key Stats

10,000*

children ages 0-5

*Estimate based off of 8,768 households in the Portrait data

Preschools

12 preschools;
500 children enrolled (**5%**)

3 preschools provide infant/toddler care;

20 children enrolled

✓ All at capacity

Other Programming

32 organizations;
2,000 people (**25%**)

↓ **70%** operating under capacity

PRESCHOOLS | 12

1 Solano

3 Contra Costa

8 Alameda

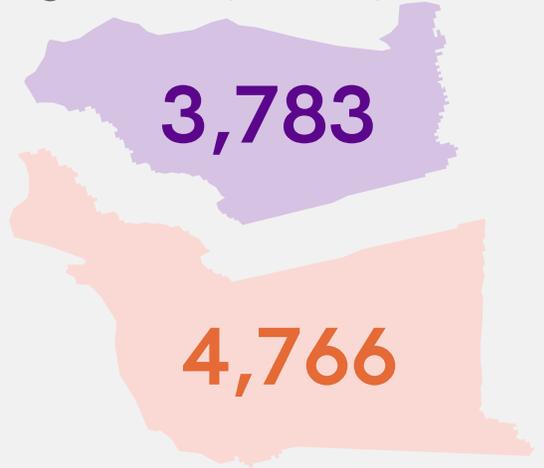


Majority of preschools are open 8 am-5:30 pm



75% of preschools are open year-round

Estimated number of households with children ages 0-5 by county



From Portrait data
Data for Solano county not available

Feel **welcome** attending events and activities sponsored by Jewish groups



Alameda



Contra Costa

Feel like they are a **part** of a Jewish community in the Bay Area



Alameda



Contra Costa

ORGANIZATIONS OFFER OTHER PROGRAMMING

32 organizations ran **331 individual programs** for over **2,000 people**

Alameda (70%)

Contra Costa (30%)



91% of organizations offer Jewish holiday programming



79% of organizations offer Shabbat programming



79% of organizations offer learning days, support groups, social and Hebrew language events, etc.



Youth Grades K-6

Key Stats

11,457 youth

From Portrait data

15 religious schools;

1,000 youth enrolled (<10%)

2,200 youth in day and residential camps (**20%**)

RELIGIOUS SCHOOLS | 15

1 Solano

5 Contra Costa

9 Alameda



1,000 youth enrolled in grades K-6; almost **90%** of them in Alameda County

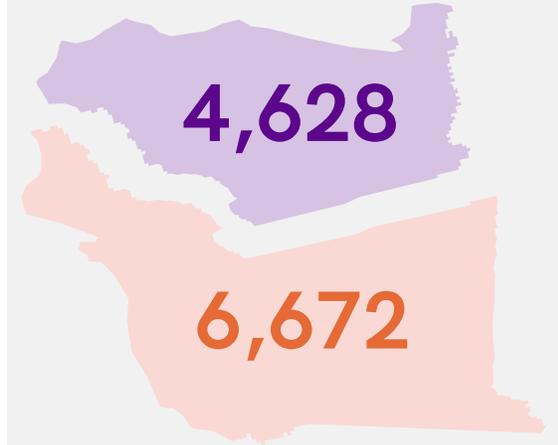


almost **half** of religious schools meet **more often than once a week**



71% schools operating under capacity

Estimated number of youth by county



*From Portrait data
Data for Solano county not available*

OTHER PROGRAMS

40 organizations ran more than **300 individual programs** for youth in the past 12 months

Alameda (43%)



Contra Costa (25%)



Regional/National* (32%)



**Includes Solano County*

Youth Groups

Local:
80 youth

National:
140 youth



all operating under capacity

Bar/Bat Mitzvah Prep Programs

11 Alameda

7 Contra Costa

1 Solano

400* youth

50%

operating under capacity

Some of these programs **serve as many as 100** youth, others **as few as 2**

**This number does not include teens who prepare with private tutors or independently*

3,300 youth in other programs

- ✓ Arts
- ✓ Afterschool
- ✓ Film screenings
- ✓ Family learning
- ✓ Jewish holidays
- ✓ Other

Camps

7 day camps 
1,100 youth

2 Contra Costa

5 Alameda

Almost 900 youth go to day camps in Alameda

5 residential camps
1,100 youth



Teens Grades 7-12

Key Stats

9,971 teens

From Portrait data

10 religious schools;
500 teens enrolled,
including **140** teens
in Midrashot

1,500 teens in
residential camps **(15%)**

Up to **900** teens in
youth groups **(10%)**

RELIGIOUS SCHOOLS | 10

1 Solano

4 Contra Costa

5 Alameda

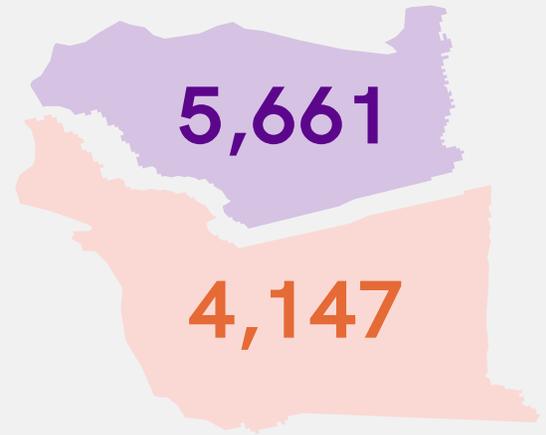


80% of religious schools
for this age **meet only
once a week**



89%
schools operating
under capacity

Estimated number of
teens by county



*From Portrait data
Data for Solano county not available*

OTHER PROGRAMS

40 organizations ran more than **350 individual programs** for teens in the past 12 months

Alameda (49%)



Contra Costa (25%)

Regional/National* (26%)

**Includes Solano County*

Youth Groups

Local:
450
teens

National:
450
teens



all operating
under capacity

Bar/Bat Mitzvah Prep Programs

8 Alameda

3 Contra Costa

1 Solano

330*
youth



50%
operating under capacity

**This number does not include teens who prepare with private tutors or independently*

2,700 teens in other programs

- ✓ Arts
- ✓ Social gatherings
- ✓ Film screenings
- ✓ Afterschool
- ✓ Family learning
- ✓ Jewish holidays
- ✓ Educational gatherings
- ✓ Leadership
- ✓ Other

Camps



5 residential camps;

1,500 teens including CITs

2/3 operating under capacity

4 day camps with **100+** teens including CITs

College Students

Key Stats

No Portrait data available for reliable population estimate

24 organizations serving **3,200** students

200 individual programs in the past 12 months

ORGANIZATIONS | 24

4 Contra Costa

14 Alameda

6 Chapters of national organizations (e.g. Moishe House)

Student Programs in Alameda

39% on campus

54% off campus

80% organizations operating under capacity

24 organizations ran **200 individual programs** for **3,200 college students** in the past 12 months

Alameda (60%)

Contra Costa (17%)

Regional/National* (23%)



*Includes Solano County

Most Popular Programs*

Shabbat (75%)

Jewish holiday celebrations (50%)

*Percent chosen among top 3

College students also participate in...

Alumni gatherings

Youth group

Camp

Day school

and

Work as staff at camps

Other Popular Programs

Social Justice

Text-based Learning

Israel*

*Only 4 organizations run Israel-related programming

Special Focus: Berkeley Hillel

2,500 Jewish students at Cal

10 staff

Annual Budget **\$1.5 M**

Students say:

Jewish life and community on campus is very vibrant with many opportunities to engage

Campus is very politically active and extremely liberal

Student Perceptions of Anti-Semitism and Anti-Zionism

34%

of Berkeley Hillel students reported personally **experiencing anti-Semitism** at higher levels than Jewish students nationwide

49%

of Berkeley Hillel students reported **experiencing anti-Israel sentiment** on campus "moderately" or "a great deal"

More engaged students report higher perception of anti-Semitism and anti-Israel sentiment

Young Adults Ages 23-40

Key Stats

15,000*
young adults

*Estimate based off of 12,592 households in the Portrait data

4,500 participate in Jewish programs (30%)

3x more young adults live in Alameda than in Contra Costa

49% of young adults are likely to move in the next 2 years; **48%** will move within the Bay Area

41% of organizations target minorities

ORGANIZATIONS | 40

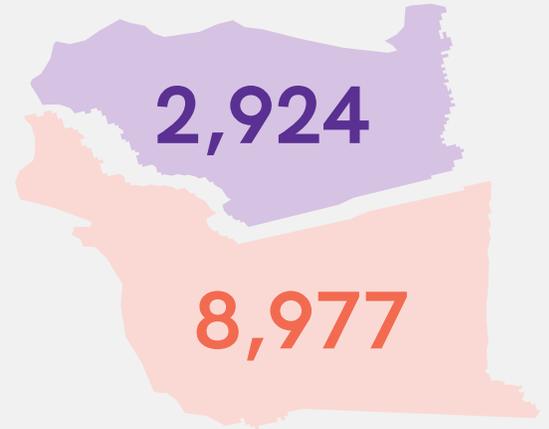
6 Contra Costa

24 Alameda

10 Chapters of national organizations (e.g. Moishe House)

73% organizations operating under capacity

Estimated number of households with young adults ages 23-40 by county



From Portrait data
Data for Solano county not available

40 organizations ran more than **450 individual programs** for **4,500 young adults** in the past 12 months

Alameda (60%)

Contra Costa (14%)

Regional/National* (26%)



*Includes Solano County

Most Popular Programs**

94% Jewish holiday celebrations

69% Shabbat

**Percent chosen among top 3

Other Popular Programs

Social justice

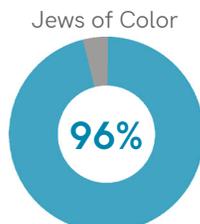
Text-based learning

Arts and culture

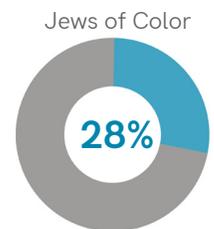
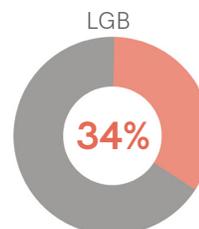
11 organizations run **Israel-related programs**; **none selected** these programs as the **most popular**

41% of organizations target LGBTQ, Jews of Color, etc.

Feel welcome[†] in attending events and activities sponsored by Jewish groups



Feel a part of a Jewish community[†] in the Bay Area



† Somewhat or very

From Portrait data

† To some extent or a lot

WELCOME VS. BELONGING: DEEP DIVE INTO EAST BAY SENTIMENT

The Community Portrait study asked respondents about the extent to which they feel welcome at the events and activities sponsored by Jewish groups; it also asked about the extent to which they feel like they are a part of a Jewish community in the Bay Area. The tables below present the East Bay community results segmented by target lifecycle stages, as well as by county, race, and sexuality. While the majority of respondents across all groups report feeling somewhat or very welcome, in most cases less than half report feeling a part of a Jewish community in the Bay Area.

Feeling somewhat/very welcome attending events and activities sponsored by Jewish groups

	Families with Young Children	Families with Youth (Grades K-6)	Families with Teens	College Students	Young Adults (23-40)	TOTAL
Alameda	55%	72%	67%	69%	83%	73%
Contra Costa	95%	94%	89%	9%	99%	93%
Solano	100%	96%	98%	98%	100%	100%
TOTAL	74%	79%	78%	69%	87%	81%
White	72%	82%	77%	10%	84%	78%
Non-White	87%	64%	83%	92%	95%	88%
TOTAL	74%	80%	78%	70%	87%	81%
Heterosexual	72%	81%	78%	83%	85%	81%
Non-Heterosexual	86%	65%	69%	10%	100%	82%
TOTAL	74%	80%	78%	70%	87%	81%

Feeling some/a lot like they are a part of a Jewish community in the Bay Area

	Families with Young Children	Families with Youth (Grades K-6)	Families with Teens	College Students	Young Adults (23-40)	TOTAL
Alameda	18%	39%	47%	16%	35%	34%
Contra Costa	52%	36%	47%	100%	23%	44%
Solano	11%	18%	99%	99%	18%	31%
TOTAL	32%	37%	48%	33%	31%	37%
White	33%	39%	48%	44%	32%	39%
Non-White	27%	27%	46%	26%	28%	31%
TOTAL	32%	37%	48%	34%	31%	37%
Heterosexual	30%	37%	47%	39%	30%	37%
Non-Heterosexual	55%	42%	68%	7%	34%	40%
TOTAL	32%	37%	48%	34%	31%	37%



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