

Progress and Problems in Federation Social Planning*

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CHANGE is the dominant note of the modern era. The motif of change pervades the social, scientific, demographic, economic and political aspects of life: no element of human existence is spared this inexorable reality. Change is not a phenomena of a particular year, a decade, or even a generation—it is a constant which characterizes the epoch. It is a reality to be contended with in life generally, and no less in the Jewish community. In such a changing world, institutions must make continual adaptation to assure their relevance and appropriateness. The price of failure to do so is obsolescence and ultimate disappearance.

The dramatic events in Jewish life in this century emphasize the application of this principle to Jewish institutions. The Holocaust, the dislocation and relocation of millions of Jews, the establishment of Israel and its hectic thirty-five year history, and the social, demographic and economic mobility of American Jewry illustrate the far-reaching developments which have affected every aspect of Jewish life. It is at their great peril that Jewish institutions fail to address the pressures for change which irresistibly are exerted upon them. The first to detect the denial or ignoring of these forces will be the

people who are served by the institutions and those who support them.

The organized Jewish community meets the challenges of change through its social planning system. It is upon sound social planning that the Jewish community depends for alertness to altered needs, dealing with issues of program adequacy, and devising soundly conceived plans for institutional alteration and innovation. Social planning is the orderly, developmental and democratic process for affecting change. The alternative to sound social planning is deterioration, disintegration and chaos.

One of the gratifying accomplishments of more than three-quarters of a century of Jewish Federation history is the evolution of a solid experience in social planning. But the very change which affects the society served by social planning has a profound impact on planning itself. It is necessary, therefore, to consider the present state of social planning and the future planning challenges which are generated by the shifting sands of the time.

Gains Made In Social Planning

The starting point for a critique of social planning in the Jewish community is its singular achievements, especially the high degree of acceptance by Federations of the essentiality of good social planning. The function is acknowledged to be basic to Federation operations,

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though characteristically, social planners themselves fail adequately to recognize the esteem in which they are held and complain of insufficient prestige, vis-a-vis campaigning for example. Planners should cast aside this unease and have greater confidence in their acceptance in the Federation system.

The level of respect for social planning in Federations is evidenced by the quality of the lay leaders who head the planning enterprise and the high standards set for the professionals who guide planning. Laymen and staff communicate regularly with their counterparts in other Federations to share experiences and they participate with them in institutes, conferences and workshops on social planning.

The concept of planning as a "process" is understood to be vital to good planning results. Participation in planning is increasingly inclusive of related agencies and organizations and concerned elements in the community. A healthy communal orientation pervades Federation social planning, with a firm emphasis on community values which is rarely diverted by special interests. Well-established also is the principle that planning approval must precede the validation of budget for significant new services. Especially impressive is the discipline which has come to be observed by leaders of agencies and organizations about social planning as the foundation of orderly community functioning.

Social planning in Federations makes growing use of special expertise in technical fields such as those of health, aging and special education, and of research and social data as a basis of planning. Efforts are made regularly to relate to planning processes in the general community and in government. There is continual progress in cultivating special funding sources—foundations, endowments, philanthropic funds and legacies

to finance new programs which emerge from planning.

Especially impressive is the way in which Jewish components are integrated into planning systems. Planning is permeated with the awareness that the *raison d'être* of Jewish communal institutions is the continuity and enrichment of Jewish life. While planning is as global as is required by the planning problem, it is solidly grounded in the ultimate Jewish purpose of the enterprise.

Part of the response to the query: "where are we in social planning in the Jewish community today?" is in the formidable list of substantive Federation planning achievements. Social planning has enabled Federations to move the programs, services and agency structure of communities in important ways, such as the following:

- accommodating to demographic changes through population analyses revealing alterations in the composition of the Jewish community (fewer children, more elderly living longer, smaller families, etc.), shifts in residential patterns (with implications for old and new areas), and revised synagogue and organizational affiliation
- integrating new knowledge and consequent improved service delivery systems into community practice, such as home health care, day care for the elderly and for preschool children, small group homes for children in foster care and for the aged, care for mentally ill in the community, and early alarm response systems for the aged and the ill.
- developing services for new constituencies or seriously underserved groups, such as the Jewish poor, the homeless, the handicapped and disabled, the retarded, the learning disabled, single parent families,

- Soviet and Iranian Jewish refugees, and Israelis residing in American communities.
- adjusting to changing government policies and practices, particularly in the reimbursement area, and most recently in respect to federal budgetary cutbacks, as all of this affects hospitals and nursing homes, vocational training and employment, educational scholarships, food supplementation, support for cultural institutions, care of the mentally ill, social security and supplementary income for dependent persons, and so forth.
 - adapting to changes in the field of Jewish education, including the rise of the day schools, the problems of the supplementary schools, relationships to denominational groups, need for more adequate financing, combining small schools, new Jewish educational roles for Jewish communal institutions (e.g., Centers, child care agencies), and the altered national service organization in Jewish education.
 - maximizing the benefits of the increasing sophistication and maturity of lay leaders, resulting from their high educational and cultural level and their demand for appropriate Jewish background, through organized training programs, institutes and study groups—within Federations, in the community generally, and through national training institutions.
 - addressing community relations issues through establishing new agencies or broadening existing ones to deal with problems such as cults, relations with Hispanics and blacks, internal Jewish community conflicts (e.g., the Satmar-Lubavitch rivalry), Israeli public relations, civil rights issues and political action and relationships.
 - dealing with the building and capital requirements of Federation agencies in an organized way, including evaluation, planning and fund raising with respect to community centers, hospitals, nursing homes, apartment houses for the elderly, camps and group homes.
 - coping with new and changing organizational and institutional relationships and arrangements, such as Hillel-community collaboration in serving college campuses, synagogue—Federation and synagogue—agency joint efforts, inter-agency coordination and merger where indicated, interrelation of agencies and civic-service groups, etc.
 - addressing issues of Israeli-American Jewish community relationships through developing joint and cooperative activities such as youth exchanges, aliyah interpretation, educational activities, travel programs, scholars-in-residence.
 - dealing with the changing nature of the relationships of the organized Jewish community to established Jewish institutions and structures, such as Jewish hospitals, child care programs and facilities, day nurseries, infant homes, Jewish settlement houses.
 - enabling the Jewish community service system to reach out to and more adequately serve orthodox and ultra-orthodox members of the community, in respect to family and children's services, vocational programs, camping, community centers, Jewish education, community relations and health and aged services, including issues of observance of Jewish practices (e.g. kashruth, sabbath), representation on agency boards and staffs, and so forth.
 - developing and implementing in-

formation and referral services to enable the Jewish communal service system to effectively extend to and serve large constituencies which are uninformed about community services, unfamiliar with their location and function, and unacquainted with how to utilize them.

Essential Conditions For Social Change In the Jewish Community

Though the forces propelling the community into adaptation and change are powerful, spontaneous resistance to change is equally predictable. Institutions have an inherent defensive mechanism even as does the animal kingdom. All manner of obstacles, fears and threats are conjured up to ward off significant institutional alterations. But social planners are aware that without accommodations and modifications to the shifting social scene, institutions lose their social usefulness. What then are some of the guidelines for Federation social planners in achieving meaningful change?

Initially, the conditions which create the need for change must be graphically enunciated and documented to generate general awareness of the imperative need for action. At the very least, change should not be obstructed by failure to interpret the full impact of the social forces which create the need for change. Key related groups and their decision-making leaders must be intimately involved in the decision to study the problem, in the study process, and in the ultimate decision for change. This requires that the principal lay and professional planning leaders cultivate close relationships with the critical leaders of affected groups to achieve mutual confidence and understanding before the process starts, at important stages during the process, at the point of

decision-making, and through the period of implementation.

The planning group for a particular matter must be carefully and sensitively constituted, with full consultation with affected groups, so there is general acceptance of the suitability and fairness of the planning body. The chairman of this planning group must enjoy general respect and possess qualities of statesmanship. A core of the committee also should have these characteristics and should not be partisans or advocates. Important leadership figures from all affected and interested groups should serve, including some who are noted for their reasonableness, flexibility and community-mindedness.

Data collected and provided the community should be as complete and reliable as possible, to avoid any group feeling that the material was biased or failed to present a particular phase of the problem. In the planning process, the views and concerns of every group should be heard, not only by their being represented on the committee, but also through their being afforded opportunities to present their views and to react to preliminary and tentative findings and recommendations before final decisions are made. Conclusions must be presented so as to reflect the fact that all factors were taken into account and that differing ideologies and group views were considered. The search for balance and mutual consideration should be evident from the give and take and trade-offs which occurred in the process.

Recognition must be accorded the special character of ideological differences and their less tractable nature. Ideology cannot be dealt with through head-on conflict, and non-doctrinal areas for potential agreement must be isolated and focussed upon. For example, in relations with the traditional community over a Federation position

on family planning and abortion, a common ground may be possible over the right of persons to freedom of choice, rather than through a direct confrontation for or against family planning or abortion.

The natural resistance of institutions and their leaders to the death or extinction of their organization should be sympathetically understood. Sometimes, termination is the only valid course and this must be faced by all the concerned people. Often it is possible to make radical changes in the functions of agencies or in their focus, thus enabling institutions to continue, albeit reconstituted for the discharge of an acceptable role. Jewish settlement houses in an abandoned Jewish ghetto can serve as the nucleus for a community center in a suburb; an obsolete home for infants can become a day care center for children or a residential center for disturbed children.

It is not uncommon that supporters of traditional social welfare functions oppose the development of new or expanded services required by the contemporary Jewish community (i.e., community relations, Jewish education, Jewish culture) for fear that this will diminish community support for family and childrens services, aged programs, community centers and hospitals. This must be countered by demonstrating the intrinsic need for the new functions, how they will be advantageous to the whole community as well as to the traditional agencies (opening up new constituencies for service, attracting new sources of leaders, providing new settings for rendering traditional roles, etc.), the way in which they will be favorable to increased fund raising, and the means by which they will afford additional support for public social policies.

Professional anxieties are sometimes serious blocks to change. They take the form of fear of personal displacement

or apprehension that changed functions will open the door to the use of professionals with unfamiliar backgrounds and less accepted competencies. Rational counter-arguments should be advanced to reassure threatened professionals: the appropriateness of the new professional skills to redefined functions and new circumstances (administrators utilized in institutional settings, social workers in pastoral counselling, community organizers in branch offices of family agencies, etc.). They should be made aware that the new staff will release the energies of established professionals for the best use of their skills and the application of their specialized knowledge and technical abilities most productively.

Some changes will be opposed by those who are apprehensive that projected new services will not respect the religious practices of groups to be served, as for example, Orthodox leaders in regard to plans for family, child care and vocational services to their constituencies. They fear unsympathetic auspices and lack of understanding of the people to be served and of their rituals and practices, and they may not have confidence in the integrity of management regarding kashruth and the like. Involvement of unassailable advocates and leaders of the Orthodox group in the study process, as committee members or consultants, as part of the operating staff, the management and leadership of the new service, and as spokesmen and interpreters to their community are important countervailing influences.

Synagogue opposition often is based upon the fear that new community functions will compete with them, diminish their appeal and reduce their holding power with their members. Cultural and youth programs in centers, Jewish family life education programs by family agencies, leadership of the

anti-cult campaign by community relations agencies, and involvement in inter-religious activities by the community relations council or Federation are sources of such anxieties. The most effective response to these concerns is full involvement of lay and rabbinical synagogue leaders in the planning process, their maximal participation in the organization and administration of new programs, location of programs in synagogues wherever possible, collaboration with local rabbinical and synagogue councils, and cooperation with national synagogal bodies.

The dynamics of controversy and conflict place limits on the efficacy of completely rational approaches to the sources of difference. Psychological, ideological and political considerations are constantly at play as forces are set in

motion to prevent or decelerate change. Sensitive, skilled leadership understands these factors and deals with them. Hostility and anger are not reciprocated: they are met with forbearance and understanding. Threats and steps to manipulate the process are not returned in kind: they are dealt with openly and with integrity. Federation representatives proceed always on the basis of utmost respect for communal pluralism, the appropriateness of the concerns of every group, the obligation to deal with these as constructively as possible, and the pursuit of central communal goals firmly but with sensitivity.

Such strategies offer the most hopeful prospect that positive social change can be realized through effective social planning.

From this *Journal* Twenty-five Years Ago

Experience has shown that maintaining the Jewish character of our agencies need not be in conflict with making our services available to a portion of the larger community. Actually, we are aided in this objective by the liberal interpretation by public officials who hold that the receipt of public funds need not conflict with the maintenance of sectarian service. As a matter of fact, Mr. Charles Schottland, former Commissioner of Social Security, stated only last year,* that while no one could give a definitive answer, it was his belief that "government never intended to deny use of funds to agencies serving the general community purpose even though they concentrated on service to a specific religious group."

The law has been helpful, too, in a somewhat different fashion. A Supreme Court ruling advanced that "government is obligated to assume financial responsibility for the general welfare benefits to which all citizens are entitled without regard to religious belief." This interpretation is possible because the emphasis is on help to the *individual* irrespective of the auspices under which the help is given. It works hand and glove with the principle of self-determination, whereby the client is guaranteed the freedom of choice and the agency retains the privilege of selecting those clients who could benefit not only from the technical skills but from the sectarian milieu to which the agency is committed by history and tradition. Thus far, in practice, government has respected the need for different sectarian milieu else why would they allocate funds to organizations clearly identified in name and purpose as sectarian services?

Martha K. Selig
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* Charles A. Schottland, "Use of Public Funds by Jewish Agencies," presented at the General Assembly of the Council of Jewish Federations and Welfare Funds, Washington, D. C., November, 1958.