

Challenges to Social Planning in Federations

SANFORD SOLENDER

Executive Consultant, Federation of Jewish Philanthropies, New York

Good social planning must be viewed as closely related to successful Federation campaigning: the two are related functions and the success of each is inextricably connected to that of the other . . . For the social planning process to be effective, all decision-making affecting planning must be channeled through it . . .

As Federation social planning has become more sophisticated, dilemmas and problems have emerged which can be solved only by application of the most creative strategies. These limitations must be surmounted for Federation social planning to succeed.

The very initiation of social planning undertakings can be faulty through an excess of casualness about the decision to make a planning commitment. A thorough consideration of the problem, the needs and circumstances which generate attention to the issue, the interests and groups which are involved, and the implications of alternative solutions is necessary before action is taken to proceed with planning. Consultation with affected and involved leadership figures is required. Too often, planning obligations are assumed before there is a state of readiness to address the issue. Timing is crucial to the success of planning and whether and when to commence a planning project are important. This preparatory stage should be an integral part of the planning process.

Social planning falters at times due to other weaknesses in the planning process. With all the stress Federations place on participatory consensus building, errors sometimes occur in administering the process itself. The planning group for a given issue may lack representation from groups or agencies that have a relationship to the issue, the chairman of the planning group

may not enjoy broad acceptability to all the related bodies and may lack the statesmanship necessary when controversial issues are at stake, the committee may not have a core of members who are disinterested and "above the fray" and thus able to provide a ballast in rough waters, the whole committee may not be fully involved in all steps and preliminary decision-making, proposed solutions to problems may not be uniformly pretested, and implementation may not be planned for and executed with the same care that is brought to planning itself. The best study—with fine research and social data, well-defined focus, and confidence of the affected groups—can break down through a faulty process. The quality of the process is a primary concern at all times.

Planning sometimes is conceived without confronting the basic, troublesome and controversial matters involved in the planning problem, as if the issue can be dealt with by circumventing the most sensitive areas. This is rarely a successful strategy—planning hardly serves real community interests if it bypasses basic concerns. Where such issues are involved as potential elimination of a program area, termination of an agency, merger of several agencies, or confrontation of the problems of inferior or unsatisfactory quality of service, a planning process which avoids them is devoid of integrity. When this occurs, the study

itself, social planning generally and the Federation are demeaned, and the central issue is not really dealt with. Planning must address the core issues, albeit with sensitivity, acumen and statesmanship.

Social planning can err by leaning too heavily on the side of the expedient or the politically desirable. Excessive measures to satisfy the fears and defensiveness of established agencies, reassure apprehensive professionals or laymen, defer to economic pressures or the preferences of contributors, and concede to particular sectarian or denominational demands are pitfalls which can derail otherwise sound social planning. The concerns of each of these groups are appropriate for consideration by planners. Rational and political considerations commingle as elements affecting planning. For professional and lay planning leaders, however, the issue is the relative weight given to these matters: where the line is drawn to protect the integrity of planning. The fatal error is in concessions which destroy the viability of the process, undermining the significance of the outcome and general respect for the planning function.

Federation social planning often suffers from the disability of being more reactive than anticipatory. Too rarely do planners pause to consider the long-range issues which affect communities and to project planning that will address matters likely to emerge in the future, but which are not yet urgent priorities. Perhaps this is explained by the crush of immediate problems upon Federations, arising out of critical issues in the budgeting area, acute deterioration of older Jewish neighborhoods, new government policies and practices, the aging of existing community buildings, or the emergence of new constituencies to be served (e.g., single-parent families, Soviet Jewish im-

migrants or new Jewish poor). The question can be fairly put as to whether many of these problems could not have been anticipated and addressed long before they reached the top of the agenda. In a sense, Federations too often are running to "catch up" to the lags in dealing with pending planning issues. Part of the problem concerns the volume of planning which a Federation can handle at a given time, in relation to staff resources, the time of lay people, the demands of campaigning, the pressures of budgeting, and the other commitments of Federations.

Yet, if planners gave more attention to defining the early warning signals and the symptomatic data and situational information which point to the emergence of problems needing planning attention, planning might become more anticipatory than responsive. The signs of major residential shifts, of deteriorating Jewish neighborhoods, of the changing character of the aged population, and of vital changes in Jewish family life are discernable long before they are translated into pressing agenda subjects for social planning committees. Federation planning is greatly challenged to move to a longer term perspective on social planning, to anticipate problems and to deal with them under circumstances and with a timetable that offers even greater promise of effective implementation than is possible with the concepts of timing now employed.

The pressure upon Federation social planning to move on a variety of issues too often causes social planners to succumb to the temptation of overcommitting the Federation on the number and extent of social planning projects which it can handle simultaneously. This has two kinds of adverse consequences. The first is an excessive and sometimes costly extension of the duration of planning projects. This can

delay decisions which are urgently needed, cause organizations to proceed independently without waiting for planning to conclude, and result in diminished confidence in the planning system. A second result of overcommitment can be a planning accomplishment which is excessively thin, and even inadequate to the task at hand.

This situation poses to Federation a difficult dilemma in trying to manage many pressures, all of which have merit. Expansion of the planning capacity, through more staff and lay people, is one apparent step to deal with this. The other is the very much more difficult one of carefully prioritizing pending planning projects, making selections through conscious choice rather than responding to relative pressures, using the best interpretive measures to explain the postponement and delay in planning projects, and making provisional, interim arrangements to bridge the period for projects which must be deferred for later planning.

There is still another time-related handicap that burdens Federation planning. This is the insufficiency of breadth and scope in time for the conception and outcome of planning. Perspectives for dealing with problems tend to be so concentrated on the pressing, immediate issues that beg for solution that long-term thinking is pushed into the background by short-term urgencies. Planning to deal with the threat of cults concentrates more on immediate measures to prevent young people from joining than on longer term approaches to the problem; coping with single parent or broken families addresses questions of how to serve the children and parents in such situations more than on how to preserve families intact; and planning for care of the elderly in their own homes addresses the complex of services which must be provided for this purpose but not the

issues of ultimate management and costs as this program becomes pervasive. A long as well as short-term focus in social planning is imperative.

Social planning suffers from the disability that some people are most comfortable planning within established blocs of functional services and find it difficult to cross traditional agency lines. Yet cross-functional planning is a *sine qua non* for dealing with most contemporary issues. Planning for the single-parent family starts with the family agency at the core, but the process hardly can proceed without child care, community center, Jewish education, the synagogue, and the vocational agency. Planning for the chronically ill and aged person certainly must have the home for the aged at its core, but such planning requires also the family agency, the community center, and the hospital. Planning for day care for children requires the community center, Jewish education, and the family and child care agency. The problems of conventional thinking regarding service structures must be contended with, even though fortunately they arise with diminishing frequency.

The use of social data in planning presents interesting dilemmas. Everyone concedes that such information is essential to good planning, but then under their breaths many people mumble that they know the answer without waiting for the data. There is even a tendency to use data to support predetermined conclusions, instead of awaiting the data, evaluating it critically, and integrating it into the process of analysis and decision-making. Too often, planning suffers from inadequate social data: information which is too general, not directly related to the issue under study, too old to reflect current shifts, or inadequately organized for study use. Appropriate social information, well-reported and organized, is

an indispensable resource for effective policy making. Its sound use is usually an index of the maturity and sophistication of social planning. Federations need to guide their planning practices with this in mind.

There is evidence of lack of clarity about the relationships between budgeting and planning in Federations. Data indicate the prevalence of a single committee for both in the larger communities and a tendency towards separate committees in the others. The committee structure is less important than the concept of respective roles and relationships. While closely related, the two functions are distinct and discrete. As a matter of fact, the separation of planning from the budgeting functions is important to the integrity of planning. Every Federation needs an instrumentality to examine social need, project social policies and programs, and propose institutional arrangements independent of the more immediate pressures of current budgetary decisions. The budget implications of planning recommendations obviously must be weighed and taken carefully into account by planning committees. But the planning process needs to be more free flowing than is possible if planning is always done within the context of immediate budgetary realities. It is preferable that planning and budgeting be viewed as two distinct but closely related processes, rather than as two aspects of a single process. What the implications of this are for committee structure: two committees, or a single committee, needs to be carefully considered by each Federation.

In the category of the financial implications of social planning, it should be noted that good planning needs the support of what the corporate world calls "R&D" (Research and Development) funds and resources for seed money. Planning should constantly be

generating new service thrusts which require testing and experimentation. Innovation in programs and practices is the grist which moves the community institutional structure ahead to new, contemporary levels of service. Federations need to concentrate, through endowments, philanthropic funds, and effective use of foundation resources, on providing social planners with the fiscal sinews with which new programs and revised institutional service arrangements can be tried and tested. This is an important product of sound Federation social planning. The lack of resources for this purpose becomes a serious inhibitor of social planning progress.

Social planning often eventuates in recommendations for capital construction involving the raising and expending of considerable community funds. In such instances, the success of the planning enterprise ultimately depends upon the capacity of the community to secure the funds which are required. The part of the planning process which addresses needs, programs and facilities, while realistic about community resources, should be relatively independent of the fund raising problem. It should define the facilities required to meet community needs apart from fund raising considerations. It should take into account the possibility of accomplishing recommendations in stages as an alternative to immediate implementation. But it should provide a set of proposals to best meet community needs.

What is sometimes neglected is the necessity to appraise community capacity to raise the required funds successfully. This is a process which must involve Federation lay and professional leadership and campaign personnel. Communities often elect also to bring in resource people to undertake such a capacity study. This may be done as

part of the planning process or as a phase to be undertaken separately. In either event, this should be considered as part of the total planning effort.

Planning usually results in programmatic and institutional recommendations which have implications for the operating budgets of the concerned agencies. In determining the acceptability of planning proposals, the Federation board and others inevitably scrutinize the annual budgetary consequences of the recommendations. The social planning enterprise often is embarrassed by the fact that when its proposals are reviewed after several years' experience, it is discovered that all the budgetary implications, including collateral outcomes, were not fully considered and that operating costs were underestimated. The frequency with which this happens suggests the importance of special care and conservatism in the way these analyses are done and in the fiscal forecasts which are made. Federations should not risk jeopardy to general confidence in their social planning by loosely arrived at or unreliable calculations of the operating costs of planning recommendations.

The planning efforts of Federations operate in a large arena, with a variety of specialized concerns constituting the Federation agenda. The inevitable result is that planning deals with areas of specialization which are far from the experience of the workers who staff Federation planning. This logically leads to the question: are Federations calling with sufficient frequency upon people with other expertise to serve as resources to their social planning—health professionals, special education experts, geriatric specialists, demographers, housing consultants, community planners, economists, management specialists, and day care experts? Very often, such people are to be found on the faculties of universities, the staffs

of foundations and government agency staffs, or are individual practitioners. Too limited use is made of such resources in Federation social planning. This is regrettable, inasmuch as such people can provide expertise often not present in the planning process. They can enrich the process considerably and their greater use merits more consideration by Federations.

It is safe to forecast that in the years ahead the necessity for significant social planning in the Jewish community will be undiminished. The prospect of continuing social change and the evolution of Jewish life will require planning with skill, foresight and courage. What are some of the aspects of planning which will challenge Federations most acutely as they confront these conditions?

The first requirement will be for far more satisfactory systems of developing and maintaining the reservoir of social data upon which planning is based. The improvisation and spot study approach of the past must be replaced by an organized plan for assembling the many kinds of information needed. Basic demographic studies, community by community, must serve as the foundation, but there must be provisions for constant expansion and updating of this data bank. The information must be published, made generally available, and studied regularly by a parallel system operating nationally, which can supplement local data with national material and inter-community analysis. Responsible Jewish social planning cannot continue with the rough, pasted together information so often employed: an organized, disciplined, socially scientific approach is indispensable. The implications for the Council of Jewish Federations and for local Federations are self-evident.

Planning of necessity involves judgments concerning the efficacy of particular programs, types and methods of

service, and organizational arrangements for their provision. Federations repeatedly make decisions to initiate new services based upon the most meager evaluative data to support the claims made for their effectiveness. They arrive at judgments about the continuance of new programs after trial periods or the maintenance of established programs with the thinnest appraisal of their accomplishments. Evaluation is never an easy matter—value judgments must be made by people, with all their human frailties. Agencies and their staffs and boards tend to be defensive and are easily threatened by the evaluation process. Yet it is a reality that with the progress of social science generally in the measurement area, Federations cannot escape the responsibility of devising more scientifically reliable instruments and methodologies for evaluating the effectiveness of their programs and services. Without this resource, social planning will be vulnerable and less than adequate.

Priority-setting undoubtedly is one of the most painful and difficult exercises which Federation leaders perform. It is hard enough to make definitive value judgments that one area of service or given program is more important or urgent than another. It is even more trying to implement this in practice, especially at the level of budgeting funds. All kinds of political forces become operative in this arena and it is tempting to arrange priorities on horizontal rather than vertical levels, to avoid the most pointed choices. Yet unless planners translate their data, their findings about needs, and their judgments about programs into values which apply to the use of resources and the order in which new community tasks are undertaken, the course of the community will be determined by expedience rather than planning. Priority-making must be a carefully con-

ceived process, based upon well-defined criteria, benefiting from board participation, strongly but diplomatically led, and faithfully applied in Federation policy, practice, and day-to-day decision making.

Not enough stress has been given to the importance of close coordination between the fund raising and social planning functions of Federations. Vital social planning is indispensable to successful community campaigns. A community best supports a service system which is relevant, steadily modernized and updated and free of outmoded programs, and is meeting contemporary needs. The awareness that dynamic social planning is constantly occurring and that change is integral to the system provides the community with the confidence which is necessary to good campaign achievements. Staff and laymen intensively involved in campaigning are recipients of important information and experience which bear upon planning processes and decisions and they can play a valuable part in the planning process. Campaign leaders can be important interpretative forces in explaining planning outcomes to the community and securing support for them. Failure to involve such people in planning can result in conflicts about decisions and can juxtapose campaign and planning leaders in conflicting rather than complementary relationships, particularly at the point of implementation of plans. Involvement of professional staffs in both fund raising and planning assignments also has a salutary affect on this matter.

Such correlation is necessary also for the planning function and fund raising for endowments, philanthropic funds, trusts, bequests, and foundation grants. Fund raisers working with potential donors of permanent or special purpose funds must relate constantly to the par-

ticular purposes for which funds are solicited. Donors set up endowment funds for objectives such as advancement of health programs, service to the retarded or handicapped, neighborhood preservation, cultural arts programs or Jewish education. Solicitors are constantly formulating presentations for use in appeals for such gifts. It is unthinkable that there be anything less than the closest coordination between fund raising and planning so that the areas for which such special gifts are sought reflect the emphasis of current and long-range planning. Moreover, the shape and contents of presentations to potential donors must grow out of the substance of the planning process.

Turning to the programmatic aspects of social planning, there are a number of important challenges to be identified. So much planning attention is directed to services for those who are physically or mentally and acutely or chronically ill, to families in trouble, to community problems and issues, and to many other immediate and urgent needs, that attention to long term, preventive programs is thrust aside. Yet, nothing is more important to the future of a sound and stable community than services which are designed to avoid illness, to avert breakdowns, and to resist the development of community problems before they mature. Preventive programs in the health field, in family and children's services, in neighborhood preservation, in early Jewish orientation and education for young children illustrate the point. Planning must focus more directly on the preventive aspects of social programs in respect to each planning problem which is addressed.

Planning efforts should be very much centered on new, progressive thrusts which elevate the quality of community services and introduce forward-looking

program ideas and methods. Not a new concept for planners, this emphasis must continue to dominate planning, which constantly should be seeking the creative, innovative ideas which can maximize the effectiveness of services and maintain their currency with evolving trends and experience. Hospice care for the terminally ill, respite programs for families of chronically ailing or severely disabled persons, residential services for young adults with psychiatric, developmental, or physical disabilities, innovative programs for substance abusers, day centers for chronically disabled children, quality of life programs for homebound chronically disabled adults, family life education and family camping illustrate this point. Every community has touched such innovations at some point in its planning: this thrust should pervade the Federation social planning philosophy.

In this regard, special attention should be given to non-institutional community-based service approaches. For a long time conventional wisdom regarded care of the elderly, the chronically ill, disturbed children and others mainly in terms of building-centered institutions: hospitals, homes for the aged, and children's institutions. Experience has demonstrated that care provided people *in the community*, preferably in their own homes, extends their lives, raises their morale and the level of their life fulfillment, and is far more economical from the viewpoint of government and Jewish communal funds. Planning should concentrate on this reality and emphasize in-the-community service: home care, day care, rehabilitation, community-based mental health clinics, outpatient hospital care and day hospitals, and similar services. Information and referral resources should stress reaching out to people to help them find their way to such programs.

Federations traditionally have sought after less-served groups needing community programs and have planned to meet their needs. This is not a time to assume that this gap has been closed, for there are many vulnerable, underserved persons and groups whose interests must be a primary concern for social planners. There must be continuing sensitivity to serving the economically disadvantaged and deprived, whose ranks have been swelled by the new unemployed who now join the long-term poor in needing special community consideration. Children of broken families, the multi-handicapped and orthopedically handicapped, severely ill elderly, the learning disabled, residual residents of abandoned Jewish neighborhoods, endangered families where there is child or wife abuse, children with special handicaps who require foster homes—these and many others must be the special concern of planners who seek constantly for those in the community who are less visible, whose needs have more recently developed, who fall between agency crevices, and for whom new community provisions are required.

No programmatic concern can be secondary for planners to that of elevating the quality of the Jewish experience afforded persons through Federation agencies. With the primacy of Federation concern for the survival, continuity and enrichment of Jewish life, an objective of Federation social planning must be the way in which agency services can further this purpose. This goal is far from having been fulfilled in present day community services and must receive special attention. It is relevant, of course, to Jewish education for children—both day and supplementary schools—and education at all age levels. But it relates as well to community centers, institutional and community services for the aged, fam-

ily life education, programs for college youth, leadership development, day and resident camping, cultural services, community relations, and Israel-related programs. This is a frontier for concentration in social planning for the future.

In this connection, the relationship of the Federation and its agencies to synagogues is a continuing concern. Past planning has advanced the level of cooperation of these groups, but the dimension of concern now must go beyond this point. Planning must examine whether synagogues should continue to be regarded as “private” organizations or should be treated as potential communal institutions. The community is concerned with providing essential services to people: personal counselling, recreation, cultural programs, Jewish education, day centers for children and the aging, counteracting the appeal of cults, involvement in Jewish and general public affairs, neighborhood organization and preservation, and similar programs. Ought not every communal resource be a potential part of the community system for providing these services? Should not the synagogues be recognized for the vital part they play in this enterprise? Assuming that synagogues accept appropriate obligations to the community (i.e., the provision of community services which are independent of denominational ideology and are open to the entire community), community discipline with respect to their planning and development and capital and operating fund raising, accountability and responsibility, is there not justification for communal subsidy of the community services they are prepared to render? Has not the community moved in this direction in respect to Jewish education service and financing, and support for synagogue and rabbinical councils? Social planning must give a long and hard look to the

need to revise old traditions and conventions and broaden the definition of "community" to embrace religious organizations which are willing to accept the reciprocal obligations entailed in this reformulation.

One of the elementary precepts of social planning is its responsibility for coordination of community services. Notwithstanding the great gains made in this regard, the future will require even more stress on wider integration and inter-relatedness of the programs of agencies and organizations in the Jewish community. This must be animated by the realization that few human or social problems can be considered discretely because of the overlap of knowledge and service areas. This is one of the singular facts that have been borne in upon communities. Thus, there must be new dimensions of collaboration between the aged and health fields, family service and centers, Jewish education and family and child care, health and centers, child care and health, Jewish education and centers, camping and Jewish education, neighborhood preservation and hospitals, community relations and family services and many others. Similarly, coordination must be assured within a service field or about a problem, as for example, services to the elderly, to families and to singles, and Jewish education. New dimensions of coordination and integration of service must be a prime concern of social planning, which must take the community far beyond its present level of accomplishment in this arena.

Finally, the revolution in the use of media for education and communication requires a social planning process to assure intelligent use of these resources for Jewish communal purposes. Cable TV, public service availability of radio and TV, and the use of computers for educational purposes are but

examples of the new opportunities which have developed in this field. Appropriate utilization of tele-communication resources can be made only through a coordinated community approach, based upon well-conceived plans, provisions for adequate financing, and a pooling of interests, skills and resources. This is an opportunity to plan, at an early stage, for a new dimension of Jewish community programming which awaits Federation initiative.

It is beyond question that social planning will be a critical role for Federations in the future. The nature and shape of the Jewish community will be profoundly influenced by the quality and effectiveness of the social planning undertaking. There are several conceptual realities affecting the social planning operation which will be essential pre-conditions to the fulfillment of its mission. Effective social planning constantly must engage top leaders of the Federation, including those who are significant to the campaign. The chairman and the key social planning leaders must be part of the overall policy-making process of Federation, as must the executive of social planning. Good social planning must be viewed as closely related to successful Federation campaigning; the two are related functions and the success of each is inextricably connected to that of the other. Social planning must be suitably supported with sufficient staff resources and budget to fulfill its function. For the social planning process to be effective, *all* decision-making affecting planning must be channeled through it: planning decisions cannot be made by the Board or any other body without participation by the social planning instrumentalities.

The opportunity for social planning for the future in the Jewish community is enormous. It will be realized to the

degree that Federations bring to this task the stature, the imagination and creativity, and the resolve and convic-

tion which will enable it to fulfill this promise.