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## Older English-Speaking Immigrants in Israel: Observations on Their Perceived Adjustment

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*Notwithstanding the increasing interest of gerontologists in the voluntary relocation of the aged, the phenomenon of immigration to Israel by English-speaking elderly has received scant empirical attention. Using a person-environment congruence framework within which to study dimensions of adaptation, the author reports on, and discusses the meaning of data collected from 223 older English-speaking relocaters to Israel. A social work practice implication with respect to preparing elderly for their move is noted.*

### Introduction

The gerontological literature of recent years has devoted increasing theoretical and empirical attention to the issue of voluntary relocation of the aged.<sup>1</sup> Concurrently, the work of Lawton,<sup>2</sup> Kahana,<sup>3</sup> and others, who have examined morale, contentment, and life satisfaction in relation to conceptualizations of person-environment congruence, has provided helpful theoretical tools for understanding the meaning of voluntary relocation for the individual in his/her later years.

Simply stated, the congruence model holds that "individuals are most likely to seek and to be found in environments

which are congruent with their needs."<sup>4</sup> And since adjustment may be loosely defined as the ongoing process of adaptation to one's self as well as to one's environment, voluntary relocation in later years of life may be considered to be the end state of a perceived need to seek and find change in order either to maintain current levels of functioning, to increase levels of functioning or, in some instances, to decrease functional output in order to maintain homeostasis between the self and the environment. An important observation, documented empirically by Kahana and her associates,<sup>5</sup> is that when older persons relocate voluntarily, the major motivating factors are not posed by the constraints of the old environment, but rather by the attractions of the new one. Thus we may broaden the concept of person-environment congruence to include the congruence between pre-relocation expectations of self-in-future situations

<sup>1</sup> See for example: Stephen M. Golant, "The Residential Locations of Spatial Behavior of the Elderly: A Canadian Example." *Research Paper No. 143*, University of Chicago, Department of Geography, 1980; Robert F. Wiseman, "Why Older People Move." *Research in Aging*, Vol. 2, No. 2 (1980), pp. 141-154; Calvin Goldscheider, "Differential Residential Mobility of the Older Population." *Journal of Gerontology*, 21 (1966), pp. 103-108.

<sup>2</sup> M. Powell. Lawton, *Environment and Aging*. Monterey, California: Brooks/Cole Publishing Company, 1980.

<sup>3</sup> Eva Kahana, "Matching Environments to Needs of the Aged: A Conceptual Scheme," in Jaber Gubrium, (ed.), *Late Life: Recent Developments in the Sociology of Aging*. Springfield, Illinois: Charles C Thomas, 1975.

<sup>4</sup> Eva Kahana, Jeanne Gibbs and Mary Datwyler, "Stress as Lack of P-E Fit and Life Change Among the Aged." Paper presented at the Gerontological Society Meeting, Toronto, November, 1981.

<sup>5</sup> Eva Kahana, Boaz Kahana, and Margaret McLenigan, "The Adventurous Aged: Voluntary Relocation in Later Years." Paper presented at the Gerontological Society Meetings, San Diego, November, 1980.

and the resources and constraints on functioning of the new environment.

Since the Six-Day War in 1967 increasing numbers of English-speaking aged, primarily from the United States and Canada, have looked to and made Israel their future home. These adventurous long-distance movers, whose relocations are undertaken primarily for ideological reasons, and only secondarily out of family considerations, have opted for a geographical, cultural, spiritual, and linguistic "transplant," inherent in which are the seeds of enormous personal fulfillment—and despair.

Though the typology is yet to be validated, English-speaking older relocaters to Israel appear to represent one of the three patterns of psychosocial continuity enumerated below:

a) *Those seeking continuity*

These are the aged who may well constitute the majority of the English-speaking older population in Israel. They do not necessarily perceive their move to Israel as a discontinuance of previous life patterns, but rather as the means by which to continue their lives meaningfully at pre-relocation levels of functioning and activity. As Isaacs<sup>6</sup> has noted with respect to the American immigrant to Israel in general: "... whether he knows it or not his is often a search for commitment within the framework of the American culture," from whence he came. Though having a paradoxical ring, this is the older Jew who perceives change or relocation as being needed in order to preserve personal equilibrium. These people might be referred to as the "adventurous re-engagers."

b) *Those seeking discontinuity*

1. *Those "winding up"*

These are the aged who, because of work or other constraints have not been able to be as active and participative as they would have liked to be before relocation. An overheard comment, typifying this group might be: "When I retire I'll start doing all those things that I have always wanted to do, but couldn't do." These we could call the "adventurous en-gagers."

<sup>6</sup> Harold R. Isaacs, *American Jews in Israel*. New York: The John Day Company, 1967, p. 235.

2. *Those "winding down"*

Though very likely constituting the minority of English-speaking immigrants to Israel, these are the aged who, owing to health and functional limitations, dependency or other needs, feel they must reduce or terminate their participation in social, organizational, or other activities. Because of ideological preferences or family considerations they have chosen Israel as the environment in which they wish to spend their last years. These are the "adventurous dis-engagers."

### The Study

Whether they have come to Israel to re-engage, to en-gage, or to dis-engage, the adjustment and adaptation processes for all older immigrants, including those from English-speaking countries, involve making a series of major life accommodations over a short period of time. The purpose of this study, a pilot exploration in the area of situational adaptation of older, English-speaking aged to their Israeli home, is to provide the reader with empirically grounded observations of relocation adaptation, using the congruence model as a conceptual framework. The author is keenly aware of the dearth of published research material on immigrants to Israel in general, and the almost total absence of empirical studies on English-speaking aged in particular. This makes the task of conducting scientific inquiry in this area that much more difficult, and challenging.

In February, 1983, in keeping with the felt need for rendering informational and referral assistance to both newcomers and veterans alike, the English-Speaking Residents Association (ESRA), a voluntary organization providing social and educational support services to a membership of over 1100 families in Israel's central region, undertook the sponsorship and organization of a one-day series of workshops and seminars dealing with life in Israel

for English-speaking residents over the age of 60. Of the 600 applicants, only the first 350 could be accommodated at the hotel. This is noted since the 350 could be considered representative of a group at least double the size.

A questionnaire was designed for the purpose of "identifying" those in attendance with respect to the following areas of interest:

- 1—demographics and immigration-related dimensions
- 2—health-related information
- 3—housing-related information
- 4—past and present involvements in activities; by type and frequency
- 5—problems related to immigration
- 6—perceived adjustment as measured by a six-item Voluntary Relocation Adjustment Index (VRAI)

Owing to the limitations of space only the findings pertaining to the VRAI item responses will be reported and discussed in any detail. Since adjustment and environmental congruence is situation specific and, in large part, culturally determined, it was felt that adjustment measures currently in use with institutionalized or community samples of American aged might not be "compatible" with the needs of this study. The six-item VRAI was therefore especially constructed for this purpose. The conceptualization of the Index, which reflects person-environment congruence as a determinant of situational adaptation, its design, and the results of psychometric testing are beyond the scope of this paper, and are reported elsewhere.<sup>7</sup> The questionnaires were distributed as individuals arrived in the morning and collected shortly thereafter. In so doing we attempted to eliminate, to the extent possible, ambient influences on responses.

<sup>7</sup> Edward Prager, "A Six-Item Index of Voluntary Relocation Adjustment of Long Distance Older Movers." Paper submitted for publication, December, 1984.

Considering that there are an estimated 12000–15000 older English-speaking immigrants in Israel,<sup>8</sup> the 600 applicants represented 4%–5% of the total group in Israel. The 223 useable questionnaires which were collected represented 64% of all those attending the conference, and an estimated 2% of the total number of such immigrants in the country. As mentioned above, however, they in all likelihood represented a group substantially larger.

### Findings

Table I presents some of the salient demographic and other personal characteristics of the 223 aged which were sampled.

Summarizing the table above, the respondents were young aged, predominantly female, whose country of emigration to Israel was almost as likely to be other English-speaking countries as the United States and Canada combined. They constituted an advantaged group in that over half have had college and/or professional education; 93% were economically independent (not indicated in the table); and a majority viewed their health as being good to excellent. Slightly more than half were married. Half of all respondents lived with their spouses, while slightly more than one-third lived alone. Sixty-one percent owned their own residence; the rest were either in rental or rent-free arrangements.

Though 61% had children in Israel, only 39% immigrated out of family considerations; clearly 61% relocated to Israel because of ideological reasons. At the time of the study one-third of the

<sup>8</sup> This statistic is based on the estimate of 120,000 immigrants from English-speaking countries, of which approximately 10% (the national percentage of older people in the population) are 65 years of age and older.

**Table 1.**  
**Demographic and Personal Characteristics (N = 223)**

1. Country of Emigration to Israel (not country of birth)	
—USA and Canada	54%
—Great Britain and Australia	25%
—South Africa	21%
2. Age Mean	68.6 years
Age Range	56–91 years
3. Sex:	
Male	28%
Female	72%
4. Marital Status	
Married	55%
Widowed	31%
Divorced, separated, or single	14%
5. Living Arrangements	
Alone	35%
With spouse	50%
With children or other family	8%
With non-relatives	7%
Own residence	61%
Rent residence (or rent free)	39%
6. Education	
Graduate education and/or professional training	57%
High school and/or trade school graduate	35%
Less than high school	8%
7. Children in Israel	
One child only	28%
Two or more children	33%
No children in Israel	39%
8. Reason for Immigration	
Predominantly ideological motivations	61%
Predominantly out of family considerations	39%
9. Tenure in Israel	
Median tenure	9 years
—less than 3 years	20%
—4–5 years	14%
—6–12 years	33%
—over 13 years	33%
10. Self-Perceived Health Status	
Good to excellent	62%
Fair to poor	38%
11. Organizational Activity Prior to Immigration	
Very active	44%
Somewhat active	28%
Not active organizationally	28%
12. Current Level of Organizational and/or voluntary activity	
Very Active	17%
Somewhat (moderately) active	50%
Inactive	33%
13. Fluency in Hebrew	
Some proficiency to fluent: reporting no communication problem	52%
No proficiency at all: reporting communication problems	48%

respondents had lived in the country for five years or less, with one-third being veterans of 13 years or more. The median tenure in Israel was 9 years.

Almost half of the respondents perceived themselves as having been very

active in Jewish organizational life in their countries of origin, with less than one-third reporting no such activities. What was interesting here was the finding of a statistically significant correlation ( $p < .05$ ) between Jewish orga-

nizational activities and country of origin. Most active were the Americans; least active were the South Africans. Post-relocation organizational and voluntary activity levels were moderate to high for 67% of the respondents, indicating a continuity of life pattern from pre- to post-relocation periods for many. Fluency in Hebrew was felt to be problematic for 48% of the respondents, and both anecdotal and statistically documented reports indicate this to be a major obstacle in the way of psychosocial integration.

The homogeneity of the respondents along such parameters as self-perceived health, tenure in Israel, sex, organizational activity, and fluency in Hebrew is noted. Also noted is the fact that since these respondents were not chosen at random, no inferences can be drawn to the universe of English-speaking aged in Israel. Along the parameters appearing in the table, however, the 223 older conference participants bore striking similarities to Kahana's sample of similar size.<sup>9</sup> The parallelism between the two groups increases the likelihood that the sample reported on in this paper is, in fact, representative of a group considerably larger than that which applied for and attended the conference.

Table II presents each of the six items in the VRAI, which were scored on a four-point scale, from "completely agree" to "completely disagree." The construct represented by the item presented together with those variables which were correlated ( $p < .05$ ) with the individual item.

While the six items in the above Index appear to be measuring somewhat different dimensions of environmental

adaptation, each in fact is a construct measuring an aspect of adjustment referent to person-environment congruence.<sup>10</sup>

### Discussion

In a population which has relocated voluntarily, whose physical and financial resources are such as to permit, in the majority of cases, a choice of alternative environments, including remaining in, or returning to the country of emigration, it is not surprising to find that, along most of the six indicators, the respondents were experiencing a relatively high degree of person-environment fit. Were we to have found the opposite, especially among veteran immigrants, it would have been difficult to explain how and why "maladjusted" yet mobile older people continue to reside in an environment incongruent with their needs. Clearly this is not the case. The fact that so many "scored" high in areas of territorial integration, control/independence, situational contentment, and need realization may be, in itself, somewhat of a validation of the person-environment congruence thesis: older English-speaking Jews sought out and found environments in Israel enabling them to remain, or to become, engaged on levels synchronous with their needs and abilities.

Not unexpectedly, and as a corroboration of countless American research efforts,<sup>11</sup> organizational and volunteer

<sup>10</sup> The Cronbach alpha statistic, used to measure the extent of internal consistency of a scale, is .87 for the VRAI, considered a reliable level of scale homogeneity.

<sup>11</sup> See for example: Erdman Palmore and Clark Luikart, "Health and Social Factors Related to Life Satisfaction." *Journal of Health and Social Behavior*, 13 (1972), pp. 68–80; George Maddox and Carl Eisdorfer, "Some Correlates of Activity and Morale Among the Elderly." *Social Forces*, 40 (1962), pp. 254–260; Zev Harel and Linda Noelker, "Social Integration, Health, and Choice."

<sup>9</sup> Eva Kahana et al., "Voluntary Relocation, Adaptive Skills, and Mental Health of the Aged." Summary Progress Report. National Institute of Health, 1979, p. 11.

**Table II.**  
**THE VOLUNTARY RELOCATION ADAPTATION INDEX**  
**Constructs, Correlates, and Dichotomized Responses (N = 223)**

Item	Construct	Correlates
1. "I HAVE FOUND A NICHE OR PLACE FOR MYSELF HERE"  <i>Agree</i> 91% <i>Disagree</i> 9%	Territorial (physical) integration	Self-perceived health; organizational activity; language fluency
2. "I USUALLY FEEL IN CONTROL OF EVENTS AND SITUATIONS THAT AFFECT MY LIFE HERE"  <i>Agree</i> 81% <i>Disagree</i> 19%	Control/independence	Self-perceived health; tenure in Israel
3. "SINCE COMING HERE I HAVE OFTEN FELT LIKE AN OUTSIDER WHO DOESN'T QUITE BELONG"  <i>Agree</i> 33% <i>Disagree</i> 67%	Psychosocial and emotional integration (alienation)	Reason for immigration; language fluency
4. "I FIND MYSELF UNABLE TO DO MANY OF THE THINGS WHICH I HAD HOPED TO DO HERE"  <i>Agree</i> 41% <i>Disagree</i> 59%	Goal related expectational congruence	Self-perceived health; reason for relocation; language fluency
5. "I DON'T FEEL COMFORTABLE WITH MY PRESENT LIFE SITUATION"  <i>Agree</i> 22% <i>Disagree</i> 78%	Perceived situational well-being (contentment)	Country of origin; self-perceived health; organizational activity; language fluency
6. "I FEEL A SENSE OF PERSONAL FULFILLMENT IN MY LIFE HERE"  <i>Agree</i> 84% <i>Disagree</i> 16%	Higher-order need realization	Perceived health; reason for relocation; organizational activity; language fluency

activity, as well as self-perceived health were significant and frequent correlates of adaptation. Also consistent with American findings was that not the quantity but the quality of activity was a correlate of adaptation. To illustrate this empirically, two dimensions of activity were developed and measured: the first, containing five items, measured activity which is largely self-directed, such as hobbies, reading, music, theatre, and visiting family. The second dimension,

containing four items, included those forms of activity which were largely other or outer-directed, including the various forms of organizational, civic, and volunteer activity. The former aspect of activity was not correlated with any of the six VRAI dimensions. The latter form of activity, however, was correlated with three of the six components. In fact, only 9% of those respondents with a low summated score for the VRAI scored high on other-directed activity. What was surprising was that no correlation was obtained for outer-directed activity and the alienation component. What may partially explain

*Research in Aging*, 4, 1 (1982), pp. 97-111; Albert Kozma and M. J. Stone, "Predictors of Happiness." *Journal of Gerontology*, 38, 5 (1983), pp. 626-628.

the absence of a significant correlation here is the very nature and resilience of personality structure. There is little question but that among the 223 respondents were those people who have always been outsiders, experiencing feelings of alienation or distance from others even within their native cultures. For these individuals involvement in activity cannot be considered as either an elevant or suppressant of such feelings since they are firmly rooted in the psyche and are, for the most part, impervious to fluctuations generated by social stimulation.

Though a cursory glance at the data may indicate for some an open-and-shut case with respect to older immigrants in Israel being happy, content, and well-adjusted, those close to the Israel scene in general, and to the gerontological literature in particular, will want to view the data with a more critical eye. The reason-for-relocation variable, for example, was a statistically significant correlate of both the alienation construct as well as the goal attainment expectational construct. It is noted that those who came primarily due to ideological motivations felt less alienated and less "frustrated" with respect to the realization of pre-relocation expectations of self and accomplishments in Israel than those who relocated primarily because of family considerations. A possible explanation for this, one which certainly requires further study and analysis, is that in those instances where people come primarily out of family considerations, an affective, kin-related dependence is operative. Once in Israel, their reliance on kin for succor may insulate them from the environmental and cultural contexts of the larger society. Ironically, this may contribute to, rather than alleviate, feelings of being an outsider and not doing, or being able to do all they hoped to achieve following relocation to

Israel. In keeping with the premise that attachment to family may not always be the "blessing" it is thought to be, especially in relations between older and younger generations, the data revealed that, of those with children in Israel, almost one-third of the elderly parents claimed to have little or no visitation with their younger kin.

It is noteworthy, from a conceptual viewpoint, that many who do feel like outsiders, who feel alienated and distant from the larger society, nevertheless respond that they have found a niche or place for themselves Israel. Considering the territorially anchored definitions of the word "niche" (synonymous with such words as "compartment," "nook," "corner," "place," or "position") the data appears to indicate that two related, but not necessarily interdependent components of integration are territorial integration (the geographic establishment of self in relation to a proxemic environment) and psychosocial integration (relating to the self in juxtaposition to the unique social, cultural, and emotional dimensions of life in the new environment.) Whether one comes for ideological reasons or out of family considerations, the need to find a niche, and the process by which it is found, may be similar if not identical. Psychosocial and emotional integration, on the other hand, which is a longer and more differentially successful process, seems to be conceptually associated with the motivations for relocation.

That situational adaptation may be culturally correlated, if not determined, is an observation reflected in the response to item five. American and Canadian elderly were more generally comfortable, perceiving greater situational well-being than their Great Britain and South African cohorts. In several interviews with South African aged, and in consultation with the South African born ESRA founder and conference

coordinator,<sup>12</sup> it became readily apparent that the South African and Israeli living environments were the most contrasting of all other pairs. South African aged have been accustomed to many amenities and diverse physical comforts which have not *generally* been features of the life styles of even affluent older American, Canadian or British Jews. Thus South Africans perceived the differences between current and former life styles most keenly of all. Within the conceptual framework of person-environment congruence, their lower "scores" on perceived well-being, reflecting as they do a generalized feeling of comfort/discomfort, could be anticipated. The practice implications of such a finding are most significant, especially with respect to the preparation for immigration to Israel, the initial stages of integration into Israeli society, and the design of micro-environments in Israel which may enable the South African Jew, among others, to establish, more readily, an environmental continuity between past and present life patterns.

The fact that tenure in Israel was correlated only with the control/independence construct and with no other component of adaptation, is a finding warranting some comment. To the extent that this construct relates to the older person's feeling able to structure, predict, and react appropriately to events and situations affecting him/her, the quantitative exposure to a specific environment and culture will facilitate the "reading" and deciphering of events and situations, especially with respect to the learning or modifying of acceptable patterns of behavioral response. Notwithstanding the personality dynamics which are also operant, such culturally responsive behavior and

<sup>12</sup> The author wishes to express his sincere thanks to Merle Guttman, Chairperson of ESRA, who made this study possible.

functioning will be best learned over time. The fact that tenure was not correlated with any of the other five constructs referent to person-environment congruence would seem to suggest that other dimensions of congruence are less reliant on the quantitative measure of time, but rather more sensitive to such qualitative measures as language proficiency, self-perceived health, and subjective reports as to level of involvement—and type of involvement—in activity. Nonetheless, tenure was expected to correlate at least with one other dimension, namely alienation. That it did not correlate may be due to the nature of the construct, and what it measures, but also to measurement error which cannot be discounted as a possibility and which, as in almost all research efforts, constitutes a potentially significant limitation of empirical endeavors.

As in Kahana's study, the responses to all items were in a positive direction for over half the sample. However one dimension approximated an almost even split, that being the one relating to pre-relocation expectations of self and post-relocation perceived abilities to realize plans and goals. Considering this observation within its conceptual context, the inability or perceived inability to attain goals or to meet expectations of self and/or others is quite likely to be a major source of frustration. That both the reason-for-relocation variable and the language proficiency variable were significant correlates of this perception (and bearing in mind the admonition of members of Kahana's sample: "be cautious. . . and don't expect anything from anyone")<sup>13</sup>, the responses to this particular construct touch upon what may be the most significant predictor of voluntary relocation "success:" the preparation for environmental change.

<sup>13</sup> Eva Kahana, *et al.*, *op. cit.*, p. 10.

### Conclusion: A Practice Note

Even for those healthy, organizationally and socially active young aged who look to Israel as a way to remain continuously and meaningfully engaged with life, the structural, cultural, emotional, and linguistic hurdles, among other obstacles which must be surmounted, often strain the adaptive capacities of older persons to their limits. The relocation literature, voluntary and involuntary, provides substantial evidence that even presumably self-chosen moves can be followed by a decline in health and morale, and that older people do, in fact, have something to fear in moving.<sup>14</sup> More significant for us has been the finding that pre-institutional relocation preparation, through discussions, counseling sessions, and through other means, has had salutary effects on those moving to residential facilities.<sup>15</sup>

Many of Israel's English-speaking older immigrants will have made their necessary mental, attitudinal, and functional adaptations to their new environment with only moderate and tolerable difficulty. For others, maintaining congruence between self and environment will have meant "packing it in" and returning to their countries of emigration. On whichever end of the adjustment continuum the immigrant may be, virtually all will need the help of informal support systems in order to maintain equilibrium while establishing themselves. Though the adjustment

<sup>14</sup> See, for example: Kermit K. Schooler, "Response of the Elderly to Environment: A Stress Theoretical Perspective," in M. Powell Lawton, *et al.*, (eds.), *Aging and the Environment: Directions and Perspectives*. New York: Garland STPM Press, 1980.

<sup>15</sup> Leon A. Pastalan, "Involuntary Environmental Relocation," in Wolfgang F. Preiser, (ed.), *Environmental Design Research*, Volume 2. Stroudsburg, Pennsylvania: Dowden, Hutchinson, and Ross, 1973.

picture for these relocaters is generally positive, many could have benefitted from varying amounts of structured relocation preparation counseling, in addition to the administrative processing out of the old environment and into the new one. As Golan and Gruska have observed, unfortunately "social workers have paid little attention to the unique adjustment problems encountered by immigrants. . . ."<sup>16</sup>

From the point of view of helping older people attain or maintain congruence between themselves and their environments, especially in such a long distance move as relocation to Israel represents, it would be most desirable and appropriate for the Jewish social work community both in the country of emigration and in Israel to establish a professionally sound and realizable program of educational, social, and emotional counseling for relocaters, both before and after immigration. Though it is not the purpose of this paper to elaborate on the content or structure of such a program, it is nevertheless briefly and simply noted that the social worker in the Jewish communal organization in the originating country can make a substantial contribution to the future well-being of many of these older relocaters through:

- a) The identification of adaptive strategies in the armamentarium of the relocater. Is the person one who, for example, is able and amenable to make changes within him/herself in order to adapt; or is the person one who looks to change the environment in order to establish congruence. Clearly the two different strategies will have substantially different results in the new setting.
- b) The assessment of adaptive capacities in light of past life situations. The extent to

<sup>16</sup> Naomi Golan and R. Grushka, "Integrating the New Immigrant: A Model of Social Work Practice in Transitional States." *Social Work*, 16 (1971), p. 82.

which an individual has evidenced flexibility and staying power in stress situations in the past may be an important indicator of post relocation adaptation.

- c) The examination of expectations of self and others within the new environment in an effort towards bringing such expectations into greater synchrony with future realities. The extent to which the older immigrant will be able to modify his/her expectational set may be a determinant of whether he/she will feel frustrated in not having accomplished what he set out to do, or satisfied in what he/she has attained.
- d) Advice, and instrumental assistance with respect to exploring those diverse environmental settings in Israel (urban, rural;

age segregated, integrated; private, collective, and so forth) which are most congruent with personal needs and resources.

Given that most older Jews do not relocate in Israel in order to die, but rather to live as actively engaged individuals, pre- and post-relocation counseling which adopts the objective of bringing individual expectations—and resources—into harmony with the Israeli reality would ensure the maintenance of continuity of self and mental health in the older immigrant embarking on a major life adventure.

#### Twenty-five Years Ago in this Journal

Ultimately, of course, I would like to see the elimination entirely of budget committees, with their "hearings" and "representations" from functional agencies. I would like to visualize a continuous communal planning body, in which lay and professional leaders of agencies and federations and chests meet together, as peers, to wrestle through the problems produced by the fact that all needs continually out-strip our capacity to serve and finance. I would envision such a body as arriving at decisions each year on priorities and long- and short-term goals through the dynamics of the *group process*, rather than through negotiation and pressure power. This is admittedly a goal for the future, but I think it will be achieved one day if we are willing to start in the right direction now.

ROBERT SLAWSON  
Spring 1960

## Separating Maintenance from Social Service: An Israeli Case Study

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*While professionals felt that separation (between financial support and personal services) was responsible for increased accuracy and fairness in determining financial eligibility, they were uncertain if separation was always in the best interest of the client.*

IN the early 1970's Alvin Schorr observed that the American government was creating a duplex society in which the government deals with the economic life of the poor under one system and that of the non-poor under the other.<sup>1</sup> This has been the case in both pre- and post-State periods in Israel.<sup>2</sup> The poor undergo scrutiny through means-tested programs, placing into question the role of progressive social policy in the modern welfare state.

Income maintenance and personal services have been within the purview of welfare agencies since the early 1930's. A decade ago, separation between them was initiated in a number of select welfare agencies, and by 1980 a law separating financial aid from services was enacted.<sup>3</sup> This historic change suggested that eligibility and treatment were to be given independently, thus enforcing the view that benefits are rights which are not conditioned on behavioral or service requirements.

The separation of maintenance from social services will be the focus of this inquiry. Its historical, ideological, and legislative dimensions will be explored. In addition, we will examine client and

professional response to this major policy change in Israeli society.

#### The Ideology of Separation

It has been suggested that "essential to an understanding of the separation issue is a recognition that the policy of separation represents no less than a fundamental departure from traditional welfare ideology, policy, and practice."<sup>4</sup> Recipients should be able to define their situation in their own terms and be provided with services only if they desire them.<sup>5</sup> The value of self-determination and improvement in the quality of both income maintenance and social service delivery are central.

In Israel the notion that client benefits are a matter of right has been alien to the country's deep ideological commitment to the work ethic. From the early development of social services in this country, income maintenance and treatment were inseparable. Preferring financial assistance was left to professional judgement. The rationale for this approach was based on the assumption that treating the individual's underlying problem could, in time, eliminate financial dependence.<sup>6</sup>

<sup>1</sup> Alvin Schorr, "Alternatives in Income Maintenance," *Social Work*, 11, No. 3 (July, 1966), pp. 22-29.

<sup>2</sup> Ruben Schindler, "Welfare and Work: Israel as a Case Study," *Social Services Review*, 55, No. 4 (December, 1981), pp. 636-648.

<sup>3</sup> "Chok Havtachat Hachnasa (Income Maintenance Law) 1980, *Sefer Hachukim*, 1980, pp. 30-38. In Hebrew.

<sup>4</sup> George Hoshino, "Separating Maintenance from Social Service," *Public Welfare*, 30, No. 2 (Spring, 1972), p. 54.

<sup>5</sup> Eveline Burns, "What's Wrong with Public Welfare," *Social Service Review*, 36 (June, 1962), pp. 111-112.

<sup>6</sup> *Hasherut Hasoziale Beknesset Israel* (Social Services in the Jewish Community of Palestine),