

IV. REACHING BEYOND OURSELVES



JEWISH IDENTITY AND DIVERSITY Balancing the Tensions

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Do Jewish Family Service agencies undermine their Jewish identity when they serve the general community? This question gains urgency in today's highly competitive human service environment, which rewards providers that diversify their funding sources by diversifying their client populations. Although Jewish identity and nonsectarian service stand in a kind of tension, there is also a complementarity between them that allows us to cultivate a productive, rather than disabling, tension. In some ways, in fact, diversifying our funding sources and client populations allows us to enhance our Jewish mission.

The 25th anniversary of the Association of Jewish Family and Children's Agencies provides an opportunity to consider how the Jewish Family Service (JFS) movement can remain as robust and effective in the next quarter-century as it has been throughout the last. Although there are many good reasons to have confidence in the continued vitality of this major Jewish communal service, JFS agencies now face an unprecedented variety of challenges. The social, political, and economic dimensions of the environment in which they operate have become more complex than at any time in the hundred or more years that many of our agencies have existed. The increasing competition for resources, combined with the changing nature of those resources, demands a higher level of sophistication in planning and decision making today than has ever been attained before. Under these conditions, the most strategically viable policies for our agencies may not be the ones we are most comfortable pursuing. In particular, we may have to cultivate such a degree of diversity in our client populations and funding sources that we may find ourselves asking how Jewish our agencies have managed to remain.

Balancing Jewish identity and diversity is not a new issue; many JFS agencies have been serving the general community and receiving support from outside the Federation system for quite a few years now, and others have at least needed to consider doing so. These

issues are not made any less difficult, however, by virtue of being familiar to some of us, and changes in the human service environment have only extended and complicated these difficulties by introducing new variables into the strategic planning equation.

From my own experiences I know that working to expand the client base and to multiply funding streams while remaining especially attentive to the needs of a particular community is a process fraught with tensions. However, grappling with these tensions is easier than living with the consequences of not doing so. Therefore, I offer here some reflections on how to balance imperatives linked to our past with imperatives connected to the new human service environment. Although I do not wish to minimize the problems associated with these tensions, my message is essentially positive: diversifying our agencies at several levels need not undermine and may even strengthen Jewish identity.

These observations grow out of experiences that are tied to a particular context. The Jewish Board of Family and Children's Services (JBFCS) of New York is a large JFS agency that serves the very sizeable and quite diverse Jewish population of New York City and the New York metropolitan area. JBFCS receives the majority of its funding from public sources and has developed many relationships with third-party payers. Because funding sources, size, and diversity of the Jewish community being served are key variables in

determining what strategy best suits a particular JFS, there are limits to how far we can extend the parallels among agencies. Yet, the commonalities linking small, large, and mid-sized agencies, and those linking agencies with different funding sources remain numerous and important. Not least among these commonalities is the shared need to respond thoughtfully to currently emerging political and economic pressures that are not selective about whom they affect. For example, a heightened cost consciousness, focus on accountability of outcome, and need for each provider to think and operate more as a business are phenomena that have not remained confined to large urban centers. Human service providers in all regions now have to adapt to these pressures. The lessons of New York are relevant to Nashville, and the lessons of Boston are relevant to Sacramento. In the end, however, readers must judge for themselves to what extent it makes sense to generalize from JBFCS's experience to their own. Certainly a thoughtful response to the imperatives of the new environment need not necessarily involve a plan for diversifying client base and funding sources. There are JFS agencies that serve only their local Jewish communities and have no difficulty operating without public support or contracts with third party payers. For the most part these agencies are smaller and serve relatively tightly knit and homogeneous Jewish populations.

The tension between cultural identity and diversity affects the JFS agency roughly in proportion to how far it goes in developing a network of nonsectarian services alongside those offered specifically to the Jewish community. Although no one would claim that serving the general community is incompatible with retaining Jewish identity, the two may seem to pull us in opposite directions. On the one hand, part of the appeal of diversifying and serving the community at large lies in the way it leaves the JFS agency better positioned to exploit an array of opportunities. Providing significant nonsectarian service allows us to cast a wider net in which to capture resources, which allows us to develop into a stronger and

more competitive agency. On the other hand, the Jewish identity of our agencies is deeply rooted in our history of service to Jews in need and in the way that service formed a good fit with a range of the Jewish communities served. Were we to lose this identity, we would surely have to ask what was the point of the drive to be competitive.

Any JFS agency that serves the general community is faced with the task of understanding this tension. Yet, seeking to understand the tension is not enough. We need to ask ourselves how we might foster a *dynamic* tension that keeps us thinking about issues of cultural identity and diversity in relation to the business of providing human services, thereby enabling us to meet more effectively the needs of all our masters. By contrast, simply accepting diversity as a given and then ceasing to think about the questions to which it gives rise will result in a static and unproductive tension. A tension that provokes reflection and self-examination is not only productive but also necessary.

As the environment grows more competitive, it is tempting to characterize service to the general community as a "survival strategy." But I resist this characterization, and my ambivalence stems from considerations that are central to my own interpretation of the tension at issue. The phrase "survival strategy" might be taken to imply that the strategy moves us in a direction that should be taken only in the event that the continued existence of the agency is in serious jeopardy. But, based on five considerations that I discuss below, diversification and service to the community at large form a strategy that many JFS agencies would do well to adopt, regardless of the security of their futures.

I do not purport to have the answer to the problem of the survival of JFS agencies in difficult times. There are far too many differences between JFS agencies for a single answer to apply across the Board, and there are too many unknowns to allow us to feel very sure about our assessments of how things stand. Given the complexity of the context within which we function, the quickly chang-

ing way in which we receive reimbursement, and the fact that we are not always clear who our alliance or merger partners will be, we must often make decisions based on incomplete information. What we do know, however, is what the needs of Jewish families and individuals, as well as those of other families and individuals, look like. We know what needs get created by a society in which there is often a value vacuum, as well as significant family dysfunction and break-up, domestic violence, substance abuse, significant anxiety, depression, and inability to function within relationships. Ours is also a society in which issues involved in mainstreaming immigrants create new dynamics and new problems for individuals and families of both host and guest populations. This knowledge is a crucial source of confidence and constancy as we move over difficult and uncertain terrain.

THE CURRENT ENVIRONMENT

All JFS agencies share a need to respond thoughtfully to currently emerging political, social, and economic pressures. Good strategic planning requires a sound analysis of all three types of pressure. Indeed, a misreading of the political climate or a failure to note demographic trends will almost certainly expose an agency to serious financial risks.

The tension between nonsectarian service and Jewish identity suggests that the survival of a religiously affiliated nonprofit organization is a more complex affair, philosophically speaking, than the survival of a for-profit enterprise. Although the latter can roughly equate survival with something like producing a profit, the former cannot. Any organization with a primary mission to a particular group is vulnerable to a fate that a purely profit-driven business is not: surviving in name but not in spirit. "Sure, something survived, but *what* did?" is a question none of us wants to have to ask about our agencies. In addition to everything else, this question would be a sign of having lost our core values and hence our sense of self. It follows, therefore, that fiscal viability is not a sufficient condition of agency survival. In this sense, we have to

deliver more than for-profit businesses.

To understand the economic pressures that complicate decision making about how to balance nonsectarian and Jewish service, we must analyze what is happening with our various funding sources: philanthropic funds, public funds, and income from contracts with for-profit organizations, such as managed care companies. The flux in the first two categories, combined with the relative newness of managed care, creates real challenges as we attempt to secure resources sufficient to ensure quality service for all our clients.

Philanthropic Funding Sources

Federation and United Way allocations continue to represent a significant portion of the budgets of most JFS agencies. Even when such allocations amount to no more than 10 to 15 percent of an agency's budget, they are nonetheless crucial to that agency's ability to meet the service needs of the Jewish community. When these allocations change in size and composition, they pose significant ramifications for the services our agencies provide. Two recent trends in philanthropic funding sources are having an especially significant impact on the delivery of services: a steady if not precipitous decline in overall support and a shift in the balance of the allocations, especially from Federations, from unrestricted toward restricted or targeted grants.

A variety of factors, which are tied to demographic changes and changes in attitude, help account for these trends. An older generation whose outlook was deeply influenced by their view of history, especially the experiences of their parents and grandparents here and in Europe, is dying off. This generation had a very strong sense of the Jewish community as a *unit* that must be protected from outside pressure and assault. One way they sought to accomplish this task was by generously giving to Jewish charitable organizations that they trusted with the task of setting priorities, thereby setting up a system very much like the old "community chest" idea. To the extent that they have become assimilated into the broader American soci-

ety, the children of this older generation feel less of a responsibility to protect the Jewish community as a whole. The relative acceptance of Jews in America and today's historically low levels of anti-Semitism experience have decreased the degree to which the Jewish community can be plausibly understood as a monolithic group under attack. We feel less threatened and challenged by outside groups. We have become more comfortable viewing ourselves as a diverse and pluralistic group whose needs resemble those of others.

Younger generations feel freer to pick and choose where they direct their giving. With many Jews sitting on the Boards of museums, universities, and other secular institutions, Jewish charities must now compete with very different organizations for Jewish philanthropic dollars and interest. The younger generation's attitude toward how to support the Jewish community has also changed. They are less trusting of charities in general, and they are also more eager to express specific preferences through *targeted* giving. In the hope of retaining the support of younger Jews, many Federations have followed the gift-designating trend by targeting their recipient agency allocations and allowing donors to designate gifts, at least in part.

The trend toward targeted giving has enormous implications for JFS and other human service agencies. Historically, our agencies received a sizeable basic grant from local Federations, which went to support core services such as family, marital, and individual counseling. The shift in the direction of thematic or designated program funding holds serious consequences for those core services and, indeed, for the institutional integrity of JFS agencies. The move seems to be predicated on the assumption that Jewish continuity and education—which have been added as key Federation priorities—are not also advanced by the traditional core services of the JFS agency.

To some extent it is true that these priorities are well served by the development of special, thematic programs. But we must not underestimate the degree to which core social services, together with an agency's basic or-

ganization and infrastructure itself, form the groundwork upon which our ability to advance specialized services rests. To the extent that this has been underestimated, much of the blame lies with our inability to articulate adequately the connection between such priorities as Jewish continuity and agency core services. The same holds true of the relationship between core services and programs that enjoy popularity at the moment, such as domestic violence services or services for people living with AIDS. We have a responsibility to do a better job of articulating these relationships, but this is not an easy task. We are competing with contemporary media that are very effective in quickly creating "hot topics" that attract the attention of those who wish to help others in need. Although the enormous interest that has been generated for such problems as AIDS or breast cancer is by no means regrettable, the way those concerns are highlighted often leaves other, less "sexy" concerns outside the focus of public attention. The everyday struggles and suffering that are the focus of our core services may be less interesting than other more dramatic problems, but they are no less crucial to people in need nor to the health of the Jewish community.

Public Funding

Another example of the economic pressures that influence our thinking about how to balance nonsectarian service with service to the Jewish community can be found in public funding. Even JFS agencies that serve only their local Jewish communities and receive no public support are not unaffected by trends in public funding. For example, provisions in the welfare reform legislation on both state and federal levels may leave needy Jewish refugees ineligible for Supplementary Security Income (SSI) benefits. But for agencies that *do* depend on government money, recent changes in public support obviously have an even more direct and significant impact.

The reduction in government support for human service agencies is the most well-known trend in public funding. The welfare

reform movement, which is to some extent motivated by a real need to reform the system and to some extent by an anti-poor sentiment, and the political popularity of tax cuts are placing publicly supported human service providers in an increasingly precarious position. The other less-noted but no less significant trend relates to the population at whom state and federal aid are directed. This population is poorer and has more serious needs and pathology than used to be the case. Therefore, publicly funded providers will have a harder time getting reimbursed by government entities for the services they provide to the working poor, the lower middle class, and some middle class groups from which our Jewish clients come. We will have to look elsewhere to make up the shortfall in public support.

Private, Third-Party Payers

A new variable complicating the strategic planning equation, and thereby affecting the way we approach the tensions between diversity and Jewish identity, is the emergence of managed care. It would be difficult to exaggerate the degree to which managed care is changing the way health and mental health care are delivered in this country. JBFCS has made being a part of this change such a priority that we have fundamentally restructured our agency to facilitate adaptation to the new environment. One reason for forming relationships with managed care companies is to compensate for the drop-off experienced in philanthropic and public support, but there are other motivations as well. For instance, if we are a player in the processes that are changing the delivery of health and human services, we will be in a position to influence their direction. In addition, managed care has opened up an opportunity for us to serve more people than we used to. We have always had a greater demand for services than we could ever meet and have always had to turn away many who needed our help. The shift to briefer, more focused services has significantly increased the number of people we can help and thereby also allows us to diversify the

populations we serve.

Managed care companies are religion blind, so taking advantage of the opportunities that managed care introduces is another rationale for serving the general community along with the Jewish community. In pursuing these opportunities, we should of course try to maximize the number of Jewish clients we can capture in the managed care net.

THE COMPLEMENTARITY BETWEEN NONSECTARIAN AND JEWISH SERVICE

To anyone who is concerned that we lose the "J" in JFS to the extent that we develop or increase services to the community at large, the notion that we should foster a dynamic tension between Jewish identity and nonsectarian service may seem problematic. The first step is to appreciate the ways in which serving the general community can complement our Jewish services and actually reinforce our Jewish identity. Five considerations illustrate the positive synergy at work between these two types of service.

Let us first consider what might be called the "leverage issue." Jewish clients use and benefit from many of the services we provide on a nonsectarian basis. Programs for victims of domestic violence, for example, or for people living with AIDS answer needs found both in and out of the Jewish community. When these programs receive government support, of course, not only non-Jewish clients benefit from the augmentation of resources. This being the case, our willingness to serve the general community allows us to leverage public money for Jewish clients with the sort of needs these programs strive to meet. Our openness to serving the community at large helps us establish good relationships with government entities, from which the Jewish community profits.

Another way that this willingness to provide nonsectarian services enlarges the pool of resources we can draw upon in serving Jews relates to infrastructure. A JFS agency that receives all of its funding from local Jewish philanthropic sources must meet all of its overhead costs using that philanthropic money.

An agency that receives public support can cover at least some of its overhead costs from public dollars. To the extent that this move liberates philanthropic dollars, that money can be redirected into value-added services for Jewish clients.

A third consideration concerns the empirical or sociological relationship between the Jewish community and the general community. Simply stated, Jews are affected by what happens to their neighbors. This is true for the whole diverse spectrum of Jewish communities, even for *Chasidic* groups that consciously cultivate insularity. It follows that it would be imprudent for Jews to be indifferent to the social welfare needs of the community at large, needs that are also present for the most part in the Jewish community. We could treat these needs only as they affect Jewish clients, but doing so would ignore the fact that the quality of life within the Jewish community rises and falls with the quality of life of the general community. When we work to improve the lives of those in the general community through nonsectarian service, we thereby provide a service, albeit indirectly, to our Jewish client.

As a fourth consideration, let us consider the notion of *tikkun olam*. "Healing the world" describes well the activity of the JFS agency that serves both Jews and non-Jews. In addition to being imprudent, it might also be unethical by Jewish standards for a JFS agency to be indifferent to the social welfare needs of the general community. Perhaps the best way

to explore this ethical question is to ask ourselves, Can one be a truly Jewish organization and help only Jews? For me, the answer is no, if without our involvement there are inadequate resources to serve the non-Jewish community.

Finally, a JFS agency can gain considerable strength from being diverse. A diversity of funding sources leaves us less vulnerable to unexpected changes in any one of them. Offering a diversity of programs to a diversity of clients makes us more flexible and thereby better able to adapt to shifts in the environment.

CONCLUSION

There are no easy solutions to the issues that arise when Jewishly affiliated human service providers choose to offer services on a nonsectarian basis. Depending on local conditions, different agencies will have to arrive at different solutions, taking into account such factors as their size, the strength of their philanthropic support, and the character and diversity of the Jewish communities they serve. My intent in this article has been to stress the need for all of us to consider the question of how to balance the tensions between Jewish identity and diversity. The current environment has made this a particularly important question, and as long as we continue to engage it in a thoughtful manner, all of our agencies—and our communities—will be able to learn and profit from the dynamic tension and creative potential.

FEDERATIONS AND JEWISH FAMILY SERVICES A Partnership to Strengthen the Caring Community

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Jewish Family Service agencies and Federations must explore together their ongoing relationships, their common concerns, and their different roles with the goal of developing new strategies to deal with today's challenging realities. JFS agencies represent the community expression of caring and must be part of the communal planning enterprise and not merely service-delivery mechanisms.

It is inevitable as we move closer to the twenty-first century that thoughtful leaders of the Jewish community should seize this time as an opportunity for extensive stock-taking about the entire Jewish enterprise. The value of a reassessment lies not only in the opportunity to define assets and liabilities and to identify the major issues that we confront, but also in the sorting out of the critical changes that need to be initiated and the continuities that should be maintained. Certainly, by now we have learned how closely inter-related are continuity and change. Indeed, some seasoned observers of the Jewish scene feel strongly that the distinctive know-how of Jewish leaders lies in their recognition that selective change has been the hallmark of Jewish continuity.

The roots of the caring community lie deep in Jewish history. Indeed, the very uncertainties confronting Jewish communities in various historic periods and in different places in the world led to the creation of portable institutions that were critical to the survival of the Jewish people. Mutual support among Jewish communities throughout the world was a practical and effective response, as well as an implementation of ethical imperatives.

Beginning over 100 years ago, the establishment of the Federation-agency system recognized that a social contract, largely implicit, bound both parties. The Federation would conduct the fund-raising campaign and allocate the funds to the agencies, and the agencies would carry out their growing programs of meeting Jewish human needs. As

the system evolved, new needs were identified and incorporated by a process of community planning in which agencies and Federation played partnership roles. With the rise of Nazism, the growth of world-wide anti-Semitism, and political and social upheavals in the European Jewish communities, the Federations and their agencies with their decades of local experience moved into the global arena (Bernstein, 1983).

Today, Federations mobilize about a billion dollars a year through their annual campaigns, endowment fund development, and capital fundraising. Together with their agencies, they leverage hundreds of millions of additional dollars through fees, governmental funds, independent fund raising, and special grants. The "gross Jewish communal product," the total result of these fiscal activities, undergirds a vast Jewish human services enterprise.

Jewish Family Service (JFS) agencies were part of this great mobilization to meet the needs of the twentieth century. As needs grew, staff became professionalized and incorporated into their work the insights of the social and psychological sciences that could improve the outcomes in the families that sought their help (Dolgoft & Feldstein, 1980). Large numbers of immigrants were cared for efficiently and effectively, and found their way into Jewish community life even as they integrated into the American environment. Comprehensive services to the elderly expanded as their numbers and needs grew. Educational and preventive services devel-