

# Case Study

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## *Enhancing Community Cohesion*

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*Conflict situations can be resolved by first engaging in a force-field analysis of the forces impelling change and those restraining change and then acting to strengthen the impelling forces and weaken the restraining forces. This case study illustrates the use of field theory in resolving a threat to community cohesion in the organized Jewish community of Orlando.*

Over the past 2 years, the organized Jewish community of Greater Orlando has been engaged in a process to resolve a serious threat to its cohesion. This case study describes that process and its implications for Shalom Bayit.

### THREAT TO COMMUNITY COHESION

Since changing from a functional federation to a federated design of community organization in 1978, the Orlando Jewish community has experienced a fourfold growth in Jewish population. This tremendous growth created an enormous pressure for the expansion of local community ser-

vices and facilities. Among the agencies created in the past 10 years were the Jewish Family Service, Holocaust Memorial Resource and Education Center, Hebrew Day School, and a community foundation. In addition, what had been a Jewish Community Center (JCC) without walls that operated as a program function of the federation was incorporated and expanded into a full-service JCC.

During the same 10-year period, there were several notable developments:

1. The annual campaign of the federation expanded a total of less than 20% to \$1.5 million while the aggregate of local agency budgets approached \$4 million from a starting point 10 years earlier of less than \$500,000.
2. Facilities were constructed to house these services at a cost of more than \$4.5 million. They were built even though only \$2.5 million of capital funds had been raised by the completion of construction in 1986.
3. The federation executive director who had served the community for 10 years left to direct a national organization in 1985. The position was vacated after one year's service by his successor and remained vacant for 18 months before I became the executive director in September 1987. The first independent audit of the federation was completed just before I was hired.

Clearly, when I arrived in Orlando, the organized Jewish community was experiencing growing pains. My initial appraisal of the situation was formulated according to the field theory developed by Kurt Lewin

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(1948; Cartwright, 1963). Put simply, change can only be accomplished if the forces impelling it are stronger than those restraining it. Strengthening the impelling forces, weakening the restraining forces, or a combination of the two can produce change. In this situation, the desired change was an increase in community cohesion.

The impelling forces, those driving the community together toward greater cooperation, were the following:

- A history of cooperative endeavors
- Rapid population growth that outstripped the growth in funds
- A desire for economies on the part of major donors and federation officers

Unfortunately, the list of restraining forces, those acting to pull the community apart, was much longer:

- A major capital debt of \$2 million, without a plan to pay it off
- Proliferation of multiple appeals by constituent agencies to fund their rapidly expanding program budgets
- An endowment program autonomous of federation that primarily attracted funds for the direct support of local agencies and philanthropic funds
- A virtually flat federation campaign
- The absence of a comprehensive, responsible financial plan for the federation
- The lack of a community-wide social planning process
- Tensions among the synagogue, rabbinic, and lay leadership about the role of federation and its constituent agencies
- Absence of most major contributors or influential lay leaders from federation or agency leadership positions
- A widespread perception of the federation and its agencies as fiscally irresponsible

Waning confidence in the federation as a funding source, growing autonomy among the agencies, and a division among com-

munity leaders about the need to build the local facilities in the early 1980s had all contributed to a move for the agency facilities to be built, managed, and funded as an autonomous corporation, separate from the federation. This condition persisted, even though the agency campus is owned by the federation, which is the only entity listed as responsible for the mortgage, and the Facilities Management and Capital Fund Raising committees were federation committees, answerable to the federation board. Various agency loyalists and leaders continued to cling to the notion that this entire dimension of community life—the construction and management of the agency facilities—should be treated as outside the realm of the federation.

#### PLAN OF ACTION

How then could the forces threatening community cohesion be neutralized and those facilitating cooperation be strengthened?

I first determined that the restraining forces that could be neutralized most rapidly, which would then allow progress toward community cohesion to proceed, were the (1) absence of involvement of major donors and influential lay leaders and the (2) lack of a comprehensive, responsible financial plan for the federation. Securing that involvement and developing and subsequently publicizing a comprehensive financial plan could both be accomplished by creating a federation Finance Committee. Such a committee would be composed of the target group of influential donors and would have the following mandate, which was incorporated into the federation's bylaws:

1. Monitor expenditures and cash flow and assure that they comply with board-approved budgets and financial policies
2. Review, approve, and recommend investments, contracts, and obligations prior to presentation to the board for approval
3. Review the financial plan of the federa-

- tion for fiscal soundness of the operation
4. Consult with the independent auditors
  5. If the financial policies and/or budgets established by the board of directors of the Jewish federation are not being implemented or followed, this committee shall have the responsibility to take steps necessary to insure notification of non-compliance on financial matters to the executive, officers, and board and, if compliance with board financial policies and/or budget is not established, then notify the membership, constituent agencies, and beneficiaries.
  6. There shall be seven voting members of this committee; credibility as contributors, financial experience, and recognition as a cross-section of federation constituencies shall be central to selection.

The committee was recruited as a blue-ribbon group composed of major contributors. William R. Cumerford, in *Fundraising: A Professional Guide* (1978), refers to such influential people as "powerful authenticators." By familiarizing this group with the realities of our community financial situation, enabling them to review our newly instituted annual audits, and providing them with a role to make policy recommendations on community financial matters, the potential to develop a newfound confidence in the federation as a responsible fiduciary emerged.

When the initial mortgage was secured for the last phase of agency facility construction (the largest), the bank required formal leases to be entered into between the federation and the agencies. These leases were hastily drawn to meet that requirement, at the nominal rent of \$1.80 per square foot. However, the federation leadership expected that, once the facilities were built, the capital campaign was established, and real costs could be determined, new leases would be drawn. The report of the audit in 1988 supported that expectation by noting that more money should be collected in rent.

The community's \$2 million debt burden and resulting high interest costs demanded the development of a comprehensive financial plan, based on the following three actions:

1. Refinancing the loan to more favorable interest rates
2. Renegotiating leases that would reflect the true costs of operation
3. Conducting an additional capital campaign to address the remaining debt

The prospects were dim that the next capital campaign would eliminate the entire debt problem because major funding sources had either been tapped multiple times during four earlier capital campaigns over the past 6 years or were in outright opposition and had refused to give significant gifts for local facilities.

The chairman of the Facilities Management Committee, the federation president, and I concurred that the first order of business was to secure a more favorable mortgage. This was done with the help of the Finance Committee and federation Board members. The next priority was to renegotiate the leases on a long-term basis to reflect true costs of operation. Only then would the community be in a position to conduct an effective debt reduction campaign. We had been told by numerous consultants and instinctively knew ourselves that a debt reduction campaign is the most difficult type of capital campaign to conduct. Therefore, it was necessary to create the most positive fund-raising environment possible in order to succeed. It was our judgment that without renegotiated realistic leases such a capital campaign could not succeed.

The agency leadership initially disagreed with our assessment. They felt financially ill equipped to handle higher overhead costs. (The proposed new leases called for a stepped-in increase over 3 to 4 years to a maximum rental of \$5.00 per square foot.) The agency leadership was fearful

that the federation would be less motivated to conduct an effective capital campaign if such leases were in place. They also feared that, even if new leases were in place, major sources of funding would be no more supportive than they had been in the past.

Negotiations with agency leadership over new leases proceeded during a full year. During this time, a popular view was cultivated through a series of newsletters, articles, and informal and formal committee discussions that, unless a comprehensive solution to our financial problem were found, one that the entire community could support, a serious financial breakdown was possible.

At the same time, a past federation president, whose credibility was unimpeachable, was recruited as chair for the capital campaign. With her participation, a decision was reached to do a feasibility study for the capital campaign. All this while the lease negotiations were in a logjam.

The findings of the capital funding feasibility study clearly demonstrated a need for a comprehensive funding formula. Its conclusion was markedly pessimistic about the prospects of success of a capital campaign without such a comprehensive approach, including leases that would cover real costs.

After the feasibility study was completed, a meeting was arranged of the Finance Committee, the capital campaign chair, and agency leaders to review its recommendations. The negotiations logjam was broken in that meeting as the presidents and executives of each of the agencies began to participate in a process of suggesting and amending each others' suggestions for various revised lease terms.

By eliminating two restraining forces—the absence of involvement by influential lay leaders and the lack of a comprehensive financial plan—the forces impelling community cooperation could emerge. Were it not for the inherent commitment of agency leadership and major donors to community cohesion and their desire that

the community successfully resolve this threat to its well-being, the conflict would still be present. Were it not for the insistence of the federation leadership and the Finance Committee that no capital campaign be conducted until a comprehensive financial plan was in place, tension over where the responsibility lies for resolving the community's financial problems would still exist.

After the lease negotiations were completed, the Orlando community began its capital campaign. The campaign is proceeding successfully because it is guided by a sense of shared responsibility between the federation and its agencies for reducing the capital debt, thereby ensuring the fiscal integrity of the Jewish community.

#### ANALYSIS

The Greater Orlando Jewish federation characterizes the agencies as "the federation family of agencies." In many respects, we behave just as our own families do. When there is a fundamental conflict, we exhibit denial, resistance to dealing with the conflict, and the tugs of self-interest. However, by insisting that the family members look at the difficulties of their situation and appealing to them to reinvest their energies in the well-being of the "family" unit, the community organizer, much as the family therapist, can be an important and constructive force in community building.

A most valuable tool available to community organizers is the field theory analysis developed by Kurt Lewin (1948; Cartwright, 1963). By analyzing issues according to this theory, it is possible to pick winnable fights, minimize the sources of resistance to change, and empower those capable of achieving true Shalom Bayit in the community.

True Shalom Bayit on a community level does not have to mean a facade of peace. It does not have to mean the avoidance of engaging in difficult turf problems. It

does mean that members of the community are committed to the survival of the community and to work together to ensure its well-being.

True Shalom Bayit, in community organization terms, can be achieved through a confluence of three separate approaches:

1. Appealing to all interested parties to become the heroes in the community-building process
2. "Lining up your ducks," recruiting a large number of "powerful authenticators"—those people, who by virtue of their influence, wealth, and activism provide the necessary funding base to make a compelling case for a federated community that by definition requires agencies to subordinate their will to a community process for progress to be achieved
3. Cultivating faith in a federation system as the best mechanism for community

betterment, priority setting, collective decision making, and planning

We must all remember what is known in Yiddish as *sechel*. By *sechel*, my grandmother meant common sense. Engaging in premature or unplanned action and failing to anticipate the restraining and impelling forces in any conflict situation are probably the most common causes of unproductive conflict.

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