

The Planning Process in the Jewish Family Agency: "Tailoring" Services to Community Needs*

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Even in the face of funding cutbacks, we, in the Jewish communal field, cannot abandon our traditional commitment to quality of service; we cannot allow a "crisis mentality" suddenly to dismantle programs which have evolved over decades. Agency-based planning can help make those services which remain after the budget cuts more effective in addressing client needs.

In our current social and economic climate, any discussion about planning ultimately makes reference to the shrinking social service dollar.

Although Cleveland JFSA may differ in size from other agencies, three trends affecting our thinking about services are probably common to all: (1) The closing of neighboring agencies and organizations, especially those funded heavily through Title XX social service monies, thereby creating new gaps in services; (2) An awareness that United Way and Jewish Welfare Fund Campaigns may not be able to fund us at previous levels; (3) A sense of urgency about how our own agency should respond to the economic and social changes occurring in our community, especially with regard to unemployment.

This paper offers some ideas about how professional planning can help make those services which still remain after the budget cuts as effective as possible in addressing client needs. The material also reflects the view that we, in the Jewish communal field, cannot abandon our traditional commitment to quality of service; that we cannot allow "a crisis mentality" suddenly to dismantle programs which have evolved over decades. In describing what my own agency is doing, I am acutely aware that our urban setting with a Jewish community

of 70,000, a large Federation and thirty synagogues and temples is not, necessarily, the experience of every reader. However, our approach might generate some ideas useful in other Jewish agencies.

Although we are continually re-assessing agency programs, that process became more intensified three years ago with the creation of a Planning and Development Specialist staff position to work with administration in assessing the effectiveness of current services as well as to help in the design of new programs. Although the position in no way relieves administration of planning responsibilities, it adds a perspective of objectivity; the Planning and Development Specialist is not totally immersed in either the direct practice or administration of programs and, therefore, can view agency operations and community trends on a broader, objective scale.

Recent years have also seen an increased involvement of board people in agency planning through the mechanism of standing board sub-committees, such as Geriatric Services, Early Childhood Services and Volunteer Services, which work with staff year-round.

At the staff level, a Staff Planning Committee, which traditionally organized staff training meetings around practice issues, has included community planning issues in its agendas. A recent meeting for the entire agency staff involved presentations by board officers about the budgeting

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process at United Way and the Jewish Federation.

As a result of these developments within the agency structure, we now have a permanent mechanism for board and staff input and more open lines of communication so that we can address the current challenges of funding cutbacks in a more systematic manner. This whole process of board meetings, staff meetings, and joint board and staff meetings around planning issues may appear to be a luxury, but the opposite is actually true; for, as the social service dollar becomes more scarce, every effort must be made to ensure a match between services and client needs. Most of us in the social work field must be painfully aware of grand designs which ended up as program failures because of some misperception about the community or a client group.

"The Wickedness" of Social Planning

Two social scientists have referred to the unique "wickedness" of social planning which requires that one particular service satisfy the needs of a very diverse client population.¹ An issue continually addressed in our agency clearly illustrates the complexities involved in planning: The Jewish population ranges from the strictly Orthodox to the "just Jewish" to those who when asked if they are Jewish, answer, "yes and no." How can we maintain counseling, family life education, religious holiday programs of relevance to every dimension of Jewish identity, not to mention the varying lifestyles, values, economic status and age groupings?

A major factor contributing to the "wicked" nature of planning is the fact that clients have *preferences* as well as needs, preferences which are molded daily by

phenomena ranging from Madison Avenue advertising which proposes a good deodorant or mouthwash as the solution to intimacy problems ("Ban takes the worry out of being close,") to the neighbors next door who go to an Encounter group to address the same issue. Clients with similar needs, therefore, may differ in their receptivity to a particular service because *preferences* come into play. This reality is especially important in planning preventive programs such as family life education, in which people are not in crisis and have more room to exercise such preferences as where they would like to attend such programs (synagogues, agency, schools, etc.) or those particular topics which are of interest. In our agency, we have moved our family life education out to community sites, which people seem to prefer; few groups are offered at the agency itself.

Another dimension of human behavior often overlooked in the planning of programs is the truism that "man is a creature of habit." An illustration of how habits can affect service planning can be drawn from an experience of a JFSA social worker helping an elderly client plan for a new living situation. Worker and client toured a high rise for the elderly which had, among its many benefits, a location adjacent to a large medical center. For the client, however, this was no benefit since her family physician of over forty years had his offices several miles away. No amount of "counseling" would have convinced her to transfer her medical record to the more convenient center near her new dwelling. The implications for service delivery are clear; as new high rises for the elderly are constructed in outer suburbia, there must be transportation to allow them to retain contact with the professional services of their choosing.

Jewish Tradition and Planning

In planning Jewish communal services, it is not only habit which must be respected, but also tradition, which has a special

¹ Horst W. Rittel and Melvin M. Webber, "Dilemmas in a General Theory of Planning," in Neil Gilbert and Harry Specht, eds., *Planning for Social Welfare*. Englewood Cliffs, New Jersey: Prentice Hall, Inc., 1977, pp. 133-145.

meaning since it has been vital to our continuity.

There are many illustrations of how Jewish tradition adds a dimension of complexity to our social planning. In recent years, at the national policy-making level, it was proposed that social agencies providing congregate meals to the elderly with government funds could not be reimbursed for the extra costs involved in serving kosher food. After much lobbying, however, the proposed "plan" was abandoned in face of the reality that *kashruth* is a part of our religious/cultural identity, and to cut funds for kosher meals would be blatantly discriminatory.

Having emphasized how the diversity of our population contributes to the difficulties in planning, it should be clear how important it is (1) to "get a handle" on the *preferences* and value systems within specific client groups and (2) to use that information in reassessing programs or developing entirely new ones. This is why some mechanism within the agency should be available for continual staff and board input; "the practice wisdom" of direct service staff is invaluable in this respect; board people, especially those active elsewhere in the Jewish community, can provide vital input about community trends and react to program ideas from the lay person's perspective. I want to emphasize the concept of *continual* input from board and staff as opposed to a one-time only board-staff retreat to discuss agency operations. Through our working committee structure, board and staff develop a "planning mind-set" over time and deeper insight into the total agency operations. Consequently, as we now are discussing the current issue of service cut-backs, we don't have to take time for lengthy orientation sessions about programs.

In addition, a Planning/Development Specialist, or a staff person assigned to carry out planning responsibilities, can

distill from board/staff inter-actions the information and recommendations for the designing or upgrading of services. It would be naive to suggest that the planning specialist relieves top administration of planning—every administrator plans programs; but a planning *specialist* can perform an important "enabling" role by doing some of the necessary groundwork.

Resources to Counteract "Wickedness"

Program planning may be "wicked," but there are many resources available to help us "overcome," many of which we take for granted. The value of a staff's "practice wisdom" and the community insight of lay leadership have already been noted. Resources which have proved useful in our agency include:

1. *Demographic Studies and Other Survey Research:*

An example useful in Cleveland is a 1979 "Survey of Older Persons in the Cleveland Jewish Community" conducted by the Jewish Community Federation. A finding that a large percentage of those interviewed saw the need for a "checking" service ultimately led to the development of an emergency and monitoring program co-sponsored by our agency and The Mt. Sinai Medical Center. Another finding that many older people learn about new services through family and friends has helped us in promoting, not only our emergency and monitoring service, but our other services for the elderly as well.

Administrators and program directors may read such demographic studies and then add them to their bookshelves, having little time to actually analyze the findings and draw planning implications from the data. A planning specialist can carry out that responsibility.

2. *Community Consulting or Advisory Committees:*

These are committees consisting of non-

board members, residents of the community we serve as well as users of our services. Use of such groups in an advisory capacity is, of course, nothing new, especially after a program is operational. However, we have been attempting, more and more, to involve community people on working committees to actually generate program ideas and be involved in program design from the very beginning. Currently, a satellite office of our agency is developing programs to address problems related to drug or alcohol abuse, especially among adolescents, as a result of a recommendation from the satellite office's Community Consulting Committee.

3. Needs Assessment Surveys:

With a planning specialist on staff, these can be carried out on a small scale to meet the agency's particular information needs, without special outside grants. In recent years, we wanted to survey personnel in our local school systems to determine how our counseling services might be useful as well as the most pressing problems they saw among their students. New family life education on topics of chemical dependency among adolescents and the impact of divorce on children resulted from that survey; our counseling staff also received further in-service training in these areas.

4. Cooperative Planning with Other Jewish Communal Agencies and Organizations:

In a large Jewish community such as Cleveland's, this is highly important, especially to minimize duplication of services. Planning committees of the Jewish Community Federation have been especially important in this regard. An example is a professional committee on services to older persons which includes a cross-section of agency representatives. The planning specialist represents our agency on a number of such committees.

5. Community Resource File:

In recent years, a manual of hundreds of services in both the Jewish and general communities was developed for staff use; the manual is maintained and updated regularly by the planning specialist. Aside from its value to the direct service staff, the resource file helps us to monitor where there are gaps in community services; also, as new agencies open their doors, we can assess whether to refer clients to them or whether our own specialized service is needed. An example of the latter would be our aftercare program for the mentally ill in which Jewish identity is a vital dimension.

Program Development—An Example

JFSA's development of a new demonstration project for Jewish single parent families illustrates the use of these planning resources. Although this program began in January of this year, work on a proposal actually began in the spring of 1980 at which time the needs assessment survey with local school systems showed that the impact of divorce on children was a critical issue facing school personnel. We then looked at a piece of survey research conducted by the Council of Jewish Women on the Jewish divorced in Greater Cleveland which found that nearly 70 percent of the Jewish divorced have children under eighteen living with them. Through meetings with NCJW volunteers, we learned that single parents who attended a special "Resource Day" (sponsored by NCJW) felt the need for support groups, rather than counseling. In meetings with local rabbis, we talked about ways in which support groups might be based at synagogues. As a draft of a program proposal was reviewed by our own agency's board as well as review committees at the Jewish Community Federation level, we received input as to how our proposed project could be coordinated with other communal programs dealing with Jewish family life. The result

of this process is our Jewish Single Parent Family Project begun in January, which has, as its core service, mutual aid support groups. There is an advisory council of single parents and community representatives helping in the initial implementation phase.

It should be noted that during this lengthy program development process, the agency's Planning/ Development Specialist was able to integrate all the information from the various studies and meetings which took place, and actually write the proposal. There was no need for an outside proposal writer as consultant. The Planning/ Development Specialist also re-

searched various sources of funding and reported that information back to administration.

In summary, this paper does not mean to imply that program planning will resolve the harsh realities of funding cutbacks at a time of a projected increase in client needs. However, the comments do suggest that a professional planning process, based within an agency, can help deal with the critical dilemma facing Jewish communal services in the years ahead: How can we uphold the strength of our families as a cornerstone of Jewish life against the backdrop of social and economic upheaval?