

member has been added with duties related to the use of volunteers.

One more comment. The development of new attitudes and new functions with respect to volunteers will probably require structural changes in the organization. New jobs and new relationships among staff members and among the organizational divisions may have to be considered, as functions are redefined. This involves decision—making at the highest administrative level of the agency.

The relationship between social work professionals and volunteers has many implications and raises many problems. Social workers will find their jobs changing in response to these problems, and change is always difficult, sometimes threatening. However, this change may well be an opportunity for greater responsibilities in planning, supervision, program development and consultation, and for a more important role for our profession.

Long Range Planning— Problems, Pitfalls, & Alternatives*

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(1) The Mythology of Long-Range Planning

In recent years there has developed a mythology around the concept of "long-range planning" that has made difficult its rational criticism and analysis of its implications. Management "specialists" and "social planners" have written learned tomes on the value of planning. Industrial firms as well as social scientists have experimented with Planning-Programming-Budgeting-Systems (PPBS), and with Management by Objectives (MBO), in efforts to eliminate the elements of "guesswork" and "rule of thumb" which often appear to be the alternatives. Those who doubt the ability to do accurate long-range forecasting are looked on as iconoclasts. For, after all, are not virtue and wisdom on the side of those who suggest that we map out our plans and programs for the next five to ten years, make a few allowances for unpredictable variables and proceed to achieve our clearly defined goals and priorities? To dare to question various methods of long-range forecasting and planning and the process of evaluation of existing programs and unmet needs for the future may sound heretical, like opposing God or motherhood. In the world of business and industry the lack of success in achievement and forecasting is usually indicated by reduction in profits or increases in financial losses, which are often buried in the financial statements that accompany the annual reports. The failures are then attributable to "bad" planning, the vagaries of consumers' attitudes, the unfriendliness of

government, and/or the political climate of the times, rather than by questioning the basic concept of long-range planning.

Why does this particular myth die hard, especially as it applies to social service planning? Man retains the myth of rationality. We would like to believe that the application of intelligence to the planning process will help us to plan for most contingencies. We hate to face, or admit to, the possibility that we can have gaps in social services, mental health programs and medical care delivery systems, that are the marked disparities in income between rich, poor and middle-class, and that we have not come up with solutions to these problems. We sometimes assume, quite falsely, that the existing "systems,"—for delivery of services, income distribution or handling of priorities—can be radically changed within a five to ten year-period by the application of computer technology, planful thinking and the use of demographic and sociological studies of needs. We tend to forget the nature of power, the forces of inertia and resistance to changes in the "status quo," the difficulty of making major "revolutions" in the structure of social agencies, funding patterns and service delivery systems.

We may modify the "system" slightly, year-by-year, and thereby help a few more clients to cope better, or differently, with life's problems. We may even add a new group of clients to those that we currently serve. Sometimes, by shifting priorities, we may be doing this at the expense of discontinuing or decreasing service to other clients. Our feeling of failure is in part due to the false sense of optimism that is built up when "long-range

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planning" is discussed. We build up expectations that cannot be fulfilled in a climate where funding remains perpetually inadequate, where we plan programs that are not put into effect until years after the need is established and where clients, staff and community lose hope while ambitious plans remain unachieved for many years.

(2) Problems of Priorities and Funding

What are the problems that are today facing family agencies, in particular, and society in general? It is a problem of major gaps in service, of unreadiness to finance or of continually underfinancing these needed services. Ultimately it is a matter of recognizing that all of one's hopes cannot be realized. But what is distressing is our calm acceptance of this attitude. We are continually told to be "realistic." Our professional training teaches us to "cope" and to help others in "coping" and "adjusting to reality." Unfortunately for social agencies such "coping" does not solve the problems that the clients have, does not meet the "unmet needs" that exist. Philosophically we are dealing with a much larger, more complex problem. It relates to society's priorities as well as the Jewish community's priorities in the social services and mental health services it wishes to support, to what extent, and under what auspices. Will government ever support the poor, the ill, the aged, the handicapped and the unemployables at a level sufficiently high so that the voluntary sector will not need to provide supplemental financial assistance, housing subsidies and homemaker service? Will they support kosher Meals-on-Wheels programs for the homebound without restrictions (such as insisting that a community's program must also provide 85 or 90 percent of the meals in congregate setting)? Will the health-care services and the transportation systems in communities be improved so that the clients will not need to be transported by volunteers to clinics? Will the government (Federal or State) underwrite all needed services, including group living facilities in the community for ex-mental hospital patients, mental retardates, and the aged who need small group homes instead of nursing

homes or homes for the aged? Will the public agencies assume total financial support for child placement in residential treatment facilities, such as Bellefaire, or will most cases still need support of voluntary agency funds?

These are just a few instances where the issues of governmental funding of social services can make a major difference as to the direction that a family agency should go. When and if governmental agencies take increased responsibility for these functions, the family service agencies can use more of their staff and funds to meet the counseling and therapeutic needs of clients. Outreach services to youth, intensive or short-term therapy for adults and children who cannot afford to see private practitioners, varieties of group therapy for those who can best benefit from this kind of treatment, family life education, therapeutic nurseries, drop-in centers for the aged that combine counseling with referral for specific concrete needs—these are the kinds of programs that family agencies can be involved in with a minimum outlay of dollars for "concrete" services to clients. Under such conditions most of the costs for agency programs would be related to staff compensation and administration of the agency.

I have specifically linked the possible areas of governmental involvement, where a change in public attitude and support can significantly change the direction that an agency is going. The same applies in terms of what directions the United Foundation or the local United Community Services or the Jewish Welfare Federation will go, and where they wish to place their priorities. To look first at the voluntary dollar from the UF or UCS, we know that their priorities have shifted in recent years. For a while it appeared as though there was going to be maximum concentration on the "inner city," helping the youth-serving agencies that were reaching out to the delinquent youngsters, the drug-abusers and the aged who remained within the core city. Lately, there has been some shift again to serving the suburban communities.

In both cases the UF and UCS have been uncertain as to whether they should support

and increase some services, discontinue others or leave the bulk of funding responsibility to government grants. United Foundation and United Community Services have been re-studying their own priorities in recent years, have gone into CAM (cost activity measurement) and other methods of accountability, and tend to compare service agencies on the basis of dollar cost rather than on the basis of effectiveness of service. Since effectiveness of service is often so difficult to measure, with the variables not easily controlled, it is understandable that dollar figures as to costs and units of productivity, being more easily understandable become the basis of comparison even though agencies are not always comparable on this basis.

My point is that the public "voluntary dollars"—the support from UF and UCS—*can shift from year to year* or within a period of a few years, and *can significantly undercut any long-range planning*. Then the planning has to take a different shape, i.e., where are we going to cut our services, and what can we keep intact, rather than where should we expand?

The same applies, of course, to the funding from Jewish Welfare Federation. Obviously they are identified with the Jewish family agency, see it as a sister agency under the umbrella of the JWF. But there are always countervailing pressures for the dollars raised in the Allied Jewish Campaign. How much should go to Israel? How much should go to increase the number of refugees to be resettled? What about Jewish education and the pressures from the Jewish day schools for increases in subsidies? Should the Jewish vocational service expand its sheltered workshop, whether or not it obtains additional state or federal funding? What about the Jewish community centers? The Jewish community council? The home for the aged? The Jewish hospital? *Sudden cutoff or reduction of funds for any of these agencies from either governmental sources or United Fund-UCS can create a crisis that will affect not only these specific agencies, but may affect the grant to*

the Jewish family service agency.

Regardless of how good the agency's program may be, how well the agency is administered, how satisfied the clientele may be (and we know that not all clients can be satisfied), and how well the plans are written and accepted by Board and staff for expansion of the agency's program, or even for the existence of the current program; if the Allied Jewish Campaign does not meet its goal for the year, if a major crisis arises in another agency that needs a fresh infusion of funds, if the grant from the UF-UCS to other agencies is reduced and the total dollars received by the Jewish agencies from them is not sufficient to meet the regular costs plus normal increases in costs for staff and services and for the coming year—then the funds will not be available to Jewish family service to meet its budget and its needs and there may even have to be a cut in services.

How reasonable and probable is this scenario? Any director who has had to struggle yearly with budget projections for the coming year, has received his grant months later and then has had difficulty in balancing his budget, will know that this perspective is real. An air of uncertainty lingers even after the budget is balanced because immediately one needs to be concerned whether some change during the course of the year, e.g. the results of union negotiations or a sudden increase in retirement costs or Blue Cross charges, will unbalance the budget and leave a deficit for the year, unless some staff or programmatic changes are made before the year is up. Even before these facts are clear for the current year, budget projections must be made for the coming year.

(3) Alternate Planning Methods in Family Agencies

What are the implications for planning as a result of this process? First it must be stated that this does *not* mean that there should be no planning in a family agency. Nor does it mean that an agency should not attempt to set priorities in its program. If anything it becomes even more important for the executive and the agency Board leadership to be

continually, on top of the situation and to be prepared to shift priorities as situations change during the course of the year. The executive, particularly, must watch the monthly and quarterly reports on expenditures, as well as the changing reports on income from counseling fees, Blue Cross, government, and payments from clients for homemaker services or child placement costs. He should be aware of shifts in percentages of the different kinds of cases that are referred for service, to see if the presenting problems deviate significantly from previous patterns. In that way he can tell whether new needs are coming to the fore or whether the community is developing different images of how the agency can serve it. The executive must be prepared to shift assignment of staff to meet the changing requests for service.

These shifts and changes in caseload and income must be watched, but the executive would be remiss if he kept his eyes totally on the present and missed the forest for the trees. One must always look ahead to what may happen in the next year or two. Equally important he must have some conception of what he would like the agency to achieve in 3-5 years; and he should look at every trend and changes in requests for service in the light of what it might foretell as to the agency's future direction.

Obviously, planning for the future, within the framework of Board and staff involvement, is necessary and desirable. However, the format of the planning process will, and should, vary from community to community, and from agency to agency. It depends, in large part, on the composition of the Board: their knowledge of the agency's program and of the community resources, their understanding of the casework process of problem-solving, and their experience in studying and analyzing community problems and needs. Some Board members want to take quick, decisive action when evaluating programs and making policy decisions that affect the long-term future; others prefer a slow, deliberate process of decision-making, that might

take months of committee meetings, fact-finding, and debates.

In some instances the total agency Board wants to get involved in discussions as to planning for the future. In other cases they prefer that the executive committee should function as the planning committee. Others may prefer delegating this task to a special committee.

We have tried all three methods at the Jewish Family Service of Detroit. Some years ago we had the Board set aside a series of meetings devoted exclusively to projecting a five-year plan, at the request of Federation, in order to set priorities and to suggest new programs. Unfortunately, the study period took too long, and there was no funding implementation of the major recommendations; but it was a healthy educative process for the Board.

Recently we used a different approach to evaluating programs and setting priorities. Our executive committee met for months to get reports on demographic trends and each of the agency programs was analyzed, statistically, and in terms of service contribution. Staff was involved in presentation of material. Both Board and staff members were given questionnaires and an opportunity to rate the priorities for existing and possible future programs; what they want now—i.e. in the next year or two—and what they feel should have priority in the next 5-10 years. Though there were some variations in ratings of priorities, both within staff and within the Board, some general trends as to program priorities were noted and a final summary of the joint recommendations was prepared by the executive committee and then submitted to the Board for their discussion.

The strength of this approach was in its *current* rating of priorities. The weakness is in suggesting priorities for five to ten years hence, because the factual data for such conclusions are rarely available, and the judgments as to future program needs are largely subjective. Interestingly, most respondents projected for the future the

programs that are currently in operation or deliberately did not make such ratings, recognizing the difficulty of making such subjective judgments. (Incidentally, the Board's and staff's responses indicated a basic affirmation and support of the primary agency programs, the ones that involve the largest number of agency cases, staff time and resources.)

A third approach is currently being tried. We felt that *new projects should be coordinated with existing programs, to be sure that they do not automatically replace existing programs that are functioning well* but do not have the halo of a "new project." To this end a New Projects Committee was set up, with the following assigned functions:

1. To initiate proposals for new projects and proposals for new agency services, or substantial increases in existing services.
2. To accept new project recommendations made by other committees, individual Board members, staff, and the Board as a whole.
3. To do research on the need for the project, the staff time involved, possible costs, projected goals to be achieved.
4. To investigate sources of funding for new projects.
5. To evaluate various project proposals and consider priorities among them.
6. To make recommendations to the Board as to acceptance or rejection of project proposals.
7. To follow up on new projects during their initial stages until it is clear as to whether the project will be incorporated into the regular program of the agency or will be discontinued.

This format will permit planning for the future on an organized, structured basis, recognizing both the process of study in order to arrive at decisions, and also that program decisions must be in relation to present realities as well as future needs.

(4) Conclusions

There are two points that I feel need special emphasis:

1. Though long-range planning may have its place in order to give a macroscopic view of the future, *more emphasis should be placed on short-range planning*—one to three years—that is related to all factors concerned with funding changes, current trends in community needs and requests for service, staff skills and immediate program priorities. Short-range planning can be more related to shifts in emphasis and funding and to new program ideas. Going through the long, involved process of long-range planning, without relating it to what is possible to achieve in the immediate future, may tend to blur the focus rather than clarify the picture. It is too easy to dream, to talk of long-range goals while the problems in the here-and-now are unresolved and often ignored. Obviously the answer is to work on both approaches; to do long-range planning in order to get a broad perspective of the agency's and community's needs, but to spend *more* of the agency's energies on short-term planning. Without the latter, long-range planning may be an exercise in futility.
2. Though social agencies are often considered "autonomous," separately incorporated and with their own Boards of Directors, we know that in reality they are thoroughly dependent on the funding and planning bodies in the community for their support. Jewish agencies that are part of the Jewish Welfare Federation can plan unilaterally, but generally cannot implement their plans without the approval and funding of Jewish Welfare Federation. Projects that originated within an agency, if they will need additional financial support, or if they may require collaboration of other Jewish agencies, need to be considered on an overall community basis, within the priorities that the community sets. In most Jewish communities there is a structure to handle requests for expansion or modification of services by specific agencies. It may be through a Community Service Division, on to a Federation Executive Committee, and followed by approval or disapproval by a JWF Board of Governors.

Regardless of the specific steps, it is very important that there be a partnership in long-range or short-range planning between the agency and Federation. We have found, in Detroit, that when a new project is proposed through *joint collaboration* of the Federation and the agency, the likelihood of implementation—and funding—is immeasurably increased. Most important, there is a commitment to continue the project for at least a specified number of years rather than having the agency “experiment” with the program for a year or two, with little sense of assurance of community backing for its continuance. We found that when we wanted to be involved in a Housing Relocation project to subsidize rentals for

Jews who were moved out of ghetto areas, and when we began a program of financial assistance for the poor or near-poor, the *programs obtained Federation support and long-term commitment because Federation was involved in mutual planning.*

In summary, long-range planning has severe limitations; when the emphasis is more on short-range planning, with some tentative projections on a long-range basis, then the planning is more meaningful. Best of all, when short and long-range planning are done with collaboration between Federation and the agency in an attempt to agree on a communal approach, then there are greater prospects of realization and implementation of the plans. At that point dreams can become realities.

The New Immigrant: A Study of the Vocational Adjustment of Soviet Jews*

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Successful adjustment of the Soviet Jew to our culture is often predicated upon vocational adjustment during the initial resettlement period. Understanding the role of occupational identity in the culture from which they come facilitates our efforts on behalf of the new Jewish immigrants.

Introduction

The following presentation will discuss the resettlement of the Soviet Jew in New York City from a vocational perspective, including three areas of inquiry: first, the background of current Soviet culture as found in the literature; second, the counseling experience with this population; and third, returns from a questionnaire focused on the attitudes and backgrounds of 100 clients of the New York Association for New Americans, the resettlement agency for Jewish immigrants in New York City.

As of August 1, 1977 there were 9,500 Soviet Jews in New York City who had immigrated within the last five years as conditional entrants (refugee visas). This is about one-half the total number of “new” Soviet Jewish immigrants to the United States. The Soviet Union has recently been releasing about 1,000 Jews per month of whom about one-half come to the U.S. Most of the remainder go to Israel. The vast majority of those in New York City are given resettlement services by N.Y.A.N.A., which provides casework and vocational services during the immigrant’s first year in America.

This one-year period of acclimatization involves learning a new language, settling a new household, coping with separation from familiar customs and norms, and becoming financially independent through employment.

The Work Ethic in the Soviet Culture

Several sources of American and Soviet

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literature indicate that work is of particularly central importance there because of the nature of the Soviet society. Ideologically, in the U.S.S.R., the concept of “socially useful labor” permeates the lives of the citizens from preschool to the actual work setting. Lenin believed that it was the responsibility of every citizen to contribute useful labor to the Communist state.¹ In fact, it is illegal to be unemployed in the U.S.S.R.² Through the implementation of the planned economy the Soviet society provides the basic needs of food, clothing, housing, health care and job security.³

The planned economy emphasizes practical, technical skills. This is evidenced in the school curriculum⁴ which focuses on preparation for jobs in technical and applied scientific occupations.⁵ These fields are imbued with high prestige because they are valuable in an industrial economy.⁶

1. Elizabeth Moos, *Soviet Education*, New York: National Council on American Soviet Friendship, 1970. p. 10.

2. U.S. Dep’t. of Labor, *Labor Digest* #90, 1965, “Decree 1961.”

3. G.V. Osipov, *Industry and Labour in the U.S.S.R.* London: Tavistock Publications. p. 89.

4. I.V. Sharov, “Educational Planning,” *Soviet Education*, Volume 17 (June 1975), p. 19.

5. K. Nozhko, *et al.*, *Educational Planning in the U.S.S.R.*, UNESCO, 1968. p. 136.

6. M.N. Rutkevich, *Career Plans of Youth*. White Plains, New York: International Arts and Sciences Press, 1969. p. 89.