

ONE HUNDRED YEARS AND STILL CHANGING

A View of the Jewish Federation from a Large City Federation Executive

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The certainties of the federation structure—a unified fund-raising, communal planning, and validation process with volunteer participation—with which most professionals entered their careers are in the process of rapid change. Federations must now refocus their vision so that they enable the strengthening of Jewish identity, the building of living bridges between the Jews of their local communities and the Jews of Israel, and the adjustment to reductions in public funding of their agencies' programs.

The American Jewish community is now several hundred years old. However, the federation, the framing institution for organized Jewish community life, is just reaching its centennial. One hundred years is a relatively short span in the life of the Jewish people. But, in the American environment and the closing years of this century, when the pace of change is overwhelmingly rapid, practitioners must greet this anniversary with both a healthy respect and a modicum of anxiety. The certainties of community organization structure and process with which most professionals entered their careers—a unified annual fund-raising, communal planning, and validation process with volunteer interest and participation—are all in the process of rapid change.

Imagine that we stand together at the top of Mt. Nebo. Before us lies the wilderness. Behind us is the promised land. The Jewish community should best take a moment to be sure of our bearings before moving on.

CHANGING VISIONS, MISSION, TASKS, AND OBJECTIVES

Federations began this century dedicated to more efficient ways of Americanizing the enormous numbers of Eastern European Jews arriving in the United States. Community leaders sought a more systematic way of fund raising to meet the financial requirements of a few domestic service agen-

cies that were organized to perform the duties historically undertaken by Jewish communities. As the century ends, we are again engaged in the effort to transfer and absorb hundreds of thousands of newcomers, although now both in North America and in Israel.

Recent surveys indicate that donors remain deeply committed to funding domestic social services. Yet, the Jewish community service spectrum is increasingly diverse. Donors also recognize a primary need to fund efforts that will deepen the identification and participation in Jewish life of many more American Jews than currently choose to become involved. Overseas challenges are growing, ranging from the continuing migration of hundreds of thousands more Jews from the Republics of the Former Soviet Union to rebuilding Jewish community life in some of those Republics. Our agenda with the people of Israel is also undergoing change. The work of the last half-century is evolving into new forms—recognizing that increasingly Israeli taxpayers will fund their own social services—in the direction of reinforcing the Jewish identity of Israel's people, most of whom are secular. Both communities face the challenges of modernity to Jewish identity for the majority of Jews who are not religiously observant.

Jewish federations must now refocus their vision to ensure that they stand the test of value and relevance to the communities

we serve. We must ask these three critical questions as we adjust our vision:

1. Are we making meaningful contributions to increasing the participation of Jews in the areas we serve and to ensuring many programs and ports of entry for deepening Jewish identities?
2. Are we engaged in building "living bridges" between the Jews of our local communities and the Jews of Israel, finding ways and means of making the Israel experience universally available to our youth and families? Can we ensure widening circles of affinity group linkages between the Jews of our communities and the Jews of Israel?
3. Are we providing effective leadership in enabling our communities to adjust to reductions in public spending with which so much of our domestic social service budget is funded?

TRADITIONAL RELATIONSHIPS ARE CHANGING

The annual campaign in most communities is in the process of change. Today, the campaign themes of years past are neither as certain nor do they wear as well with donors. Yet, the annual UJA-federation campaign remains the organized American Jewish community's largest annual source of unrestricted dollars to meet the fullest range of Jewish communal responsibilities. Increasingly, federations are taking a total resources/total applications approach to resource development, relating to donors' desires to concentrate some or all of their giving on areas of their personal preference, as distinct from the communal allocation.

Many campaigns are finding it difficult to persuade major donors to increase their gifts from the previous year. Yet, those same donors *will* give much more, provided they can direct their supplemental gifts toward areas of personal concern. Federations must adjust, therefore, in order to wed communally determined priorities to donors' desires to designate some of their an-

nual Jewish giving. Starting with the conviction that communal planning, priority setting, and program evaluation/accountability are all attractive to donors, federations retain a substantial market advantage if they are able to link these strengths and capabilities to the donors' desire to designate. Increasingly, large city federations are reporting all the resources secured in a fiscal year and all the distributions (applications) of those funds in the same period, a way of reflecting more accurately this changing relationship between community needs, donor preferences, and the capability of the federation to link them.

Currently, as federations work through these marketplace changes, increased tensions exist in many communities between federations and some of the stronger constituent agencies. These agencies, particularly during the six years of special campaigning for Operation Exodus, continued on their course of expanding needed domestic services while increasing efforts in supplementary fund raising—both from foundations and their own annual campaigns. Today, in some communities, there is a tendency among some agencies to pull away from the federation in the short-sighted view that since federation campaign allocations provide a decreasing percentage of their annual budgets, they are financially better off going their own way. Most federations will work with those agencies to focus on the many non-campaign benefits of being part of a communal whole. Yet this tension comes at a time when many smaller agencies are at greater risk, either because of the enormous changes afoot in public sector funding or because of an inadequate management capability needed to adjust the agencies, programs, and services they manage to meet the changing times.

The funding of overseas causes, which the leadership agrees is needed more dramatically than ever before, seems less important to some donors. The veil of secrecy under which the Joint Distribution Committee (JDC) has operated for so many decades

and the twenty years of increasingly resonant criticism of the Jewish Agency for Israel have weakened major donor interest and support in these agencies. Both organizations are in the process of change: JDC is seeking closer governance linkages with local communities and key donors, and the Jewish Agency may be entering a period of maximal change away from provision of services that could be provided to Israel's people from Israel's treasury toward becoming the Israeli gateway on the "living bridge" between the Jews of the Diaspora and the Jews of Israel.

Federations are rooted in these complex local relationships with donors, agencies, and committed volunteers. As the sage politician once noted, "All politics are local." When the local community demands change, then change the federations must, if they are to continue to serve their communities.

FOCUSING FEDERATION'S WORK TO MEET NEW CHALLENGES

The work of today's federation is organized around six major disciplines: financial resource development, community planning, overseas, community relations/government relations, management assistance including asset management, and human resource development. These are the elements needed to accomplish the agenda entailed by our changing vision.

Financial resource development encompasses all aspects of federated fund raising including annual and special campaigning, endowment development, grant writing (for foundations and, in some federations, for government agencies and United Way funds), investment management, and capital campaigning. Every one of these aspects of fund raising requires new skills and knowledge to be pursued most effectively. Increasingly federations will need to adjust their allocation processes and to update their relationships with their agencies to account more effectively for the increasing amounts of non-campaign financial re-

sources flowing from federation to agency services.

Community planning has become an increasingly important added value that federations provide to the communities they serve. Donors increasingly want empirical evidence that the dollars they give are needed and effective. Changes in United Way and public support for nonprofit social services necessitate new, creative, and collaborative ways of serving more needs with fewer dollars. This is an additive role for federations, entailing sophisticated needs and program assessments and managing processes that lead to greater cooperation and collaboration among providers. Finally, the federation planning role is essential to assuring donors that their dollars are being well and efficiently directed toward meeting needs.

Overseas activities of federations are becoming more varied and complex. The process of establishing living bridges to the people of Israel means the management of many more programs of personal linkages between people and programs in our communities and people and programs in Israel. Project Renewal, a decade ago, and Partnership 2000 today represent national efforts to enable more federations to enjoy these personal linkages. Yet, more and more of the larger federations have structured multiple direct program links in their efforts to deepen and widen personal connections between their communities and Israel. And, in recent years, more federations have established direct linkages with communities in Russia and/or the Ukraine or in Eastern Europe. These relationships shrink the distance between donors, the community federation, and the end clients, and in so doing, they personalize *tzedakah*.

Community relations/government relations for many large federations are relatively new concerns. However, as the preparation for reductions in public funding of social services provided by Jewish communal agencies to Jews in need makes clear, hundreds of millions of public dollars

providing services to hundreds of thousands of frail, vulnerable, and needy Jews are currently in the system. The next years will see reductions in public funding, elimination of programs to which the Jewish community has become accustomed, and possibly radical change in many publicly supported services on which our members and clients rely. Our efforts to influence the way in which the reductions will occur entail greater involvement in the public arena. In so engaging, sensitivity must be given to potential coalition partners or adversaries in the effort to secure these dollars—necessitating the more forthright engagement of federations in the domestic community relations agenda.

Management assistance, providing an ever-increasing range of financial, asset management, banking, investments, board and staff development, and related service functions, is increasingly required of federations to ensure that their beneficiary agencies are capable of providing the services our donors and community members expect. In most large communities there are large agencies able to meet their full allotment of business needs, but there are also many smaller agencies capable of offering good service to their members, clients, or students but that lack business and governance know-how. From this latter group come periodic crises requiring federation engagement and resolution of the issues. As communal services and funding become increasingly complex, federations must be prepared to step in and assist their agencies. Often doing so is more important than federation's direct financial support in ensuring quality service.

Human resource development, the process of identifying, recruiting, training, deploying, and maintaining volunteer and professional leaders and workers, is increas-

ingly a central task of federations. As the generations of leadership change and the issues and causes that motivated the present generation of top leadership—lay and professional—change, the effort to excite and engage people in the work of strengthening the Jewish community becomes increasingly challenging. Federations today consider the performance of this function among the top tasks to be undertaken.

THE NATIONAL AND INTERNATIONAL AGENCIES OF ORGANIZED JEWISH COMMUNAL LIFE MUST CHANGE

As we face this milestone and the conditions and circumstances in which today's federations find themselves functioning, we note that in Israel and overseas (particularly in the Russian and Ukrainian states in which, despite daunting conditions, Jewish communal life is rejuvenating), and in North America, the organizations that serve the local communities are in the process of change as well. Federations have demanded change in response to their local realities, which, when discussed at national meetings, seem to be common to all our communities. Donors want change. Service agencies need change and different kinds of support than a generation ago.

We face our centennial celebration in the sober reflection that tomorrow's American Jewish community will be decidedly different from the one that drew us into Jewish communal service. We in the professional leadership cadre must ensure that this will be so. And in that empowering recognition, we greet our centennial with the pride in our collective accomplishments to date and in the joy that our people is ever evolving and will insist on the new forms that will serve our next generations with dynamism and elan.