

LOCAL SERVICES: A LOOK INTO THE FUTURE

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[Federations now realize] that it is no longer possible to do business as usual in the allocation of funds. Conditions and the growing fiscal stringency requires new approaches, more thinking and planning and an awareness of the need to be less reactive and more assertive. The Federation is the closest thing we have to an organized Jewish community, and as such, it has the responsibility to insure the creative survival of that community. Creative survival must be converted from an abstraction to concrete programs.

A number of conditions and trends, in the country generally and within the Jewish community, are increasingly focusing attention on the problem of adequate financing of local services. The problem is an unusually difficult one and it is the purpose of this paper to explore some of the ways in which Federations and agencies may attempt to cope with it.¹

This discussion is based upon the following assumptions:

1. that in most communities income will remain more or less stable for the foreseeable future;
2. that the stabilization of income in many communities will create increasing tension around the issue of support for local and overseas causes, and that this tension, if not dealt with in a planful way, may constitute a threat to our historic community consensus and stability;
3. that the needs overseas, in Israel and elsewhere, will continue to be critical and that Federation's responsibility in this area of concern will not significantly change in the foreseeable future;

4. that the problem of the future of local services is more serious in small cities where income is stable or declining, since their limited resources give them less flexibility than larger communities have;

5. that while there is no substitute for money, there are things we can do which may bring some light into an otherwise dark picture.

To have a fuller understanding of the nature of the challenge and what we might do about it, it would be helpful to review briefly the factors which have brought us to our present situation.

SOCIAL AND DEMOGRAPHIC TRENDS: WITHIN GENERAL AND JEWISH COMMUNITIES

We are all more or less familiar with the major trends in this country which have had a major impact on the nature and scope of all social services, including those sponsored by Jewish communities. They include fragmentation of the family, the aging of the population, the generation gap, geographic mobility, the growth and decline of public welfare, the drug culture and others. Sometimes, as in the case of the reduction of public support of Medicaid, the impact is immediate and dramatic.

The major Jewish demographic trends

1. See Herman Markowitz; "Allocating Shrinking Resources—The Ethical Dilemma," *Journal of Jewish Communal Service*, Spring 1984, pp. 222-229. A thoughtful discussion of ethical and related problems arising from the decline of income.

were reflected in the National Jewish Population Study.² These include increases in family break-up, growing needs of the aged, increasing numbers of single-parent families, mobility and geographic dispersion, and the decline of volunteer participation. The study also revealed a number of developments of special significance for the future viability of Jewish communities. Among these are the serious weakening of the sense of Jewish identity, an alarming rate of intermarriage, decreasing synagogue and organizational affiliation, and zero population growth. Not the least of the findings of the study was the fact the younger generation of Jews is much less related than their parents were to traditional institutions, such as religion, synagogue and community, and that they contribute to our philanthropic campaigns on a much lower level. They also tend to be more interested in local services than in overseas needs.

With the exception of growing communities in the sun-belt and a few other places, a crucial fact of Federation life is the stabilization or decline of income.³ At the same time, for the reasons mentioned, there is more pressure for certain types of local services. Since most of the money continues to come from people with a primary interest in Israel and other overseas causes, communities are finding it increasingly difficult to reduce the percentage allocated for overseas needs, with the result of growing tensions around this issue.

There has been one overall effect of these trends on Federations, namely, the realization that they cannot continue to do business as usual. Communities of all

sizes, with all their differences, are finding that just raising the money and signing checks aren't enough any more to deal adequately with the mounting pressures. For the first time, many communities are having to face the fact that it's no longer a question of how best to allocate a larger or smaller amount for local services, but rather how to decide which services shall be reduced or eliminated. This in turn involves vital questions of community priorities, values, traditions and relationships; it requires greater knowledge, a clarification of communal objectives and a sense of direction. Perhaps most important of all, there is growing concern about the fundamental problem of the weakening sense of Jewish identity, the rate of intermarriage, survival and what the community and its agencies can do to insure that survival. There is the realization that Federations have to have a viewpoint and to exert leadership around these issues. There is a growing consciousness about the need for changes in Federation-agency relations, based on the concept that the whole is greater than any of its parts.

FEDERATION-AGENCY RELATIONSHIPS

As Federations increasingly assert a central viewpoint and attempt to exert influence on the nature and scope of agency programs, the cry of "autonomy and independence" will increasingly be heard.

In recent years, the question of Federation-agency relations has been discussed frequently and in depth at meetings of the Conference of Jewish Communal Service, at the General Assembly of the Council of Jewish Federations, and at many boards and staff institutes. Practically every major aspect of the issue has been explored.

In making a number of suggestions about how to deal with the threat of decline in income and services and its ef-

2. See Fred Massarik and Alvin Chenkin, "United States National Jewish Population Study: A First Report," *American Jewish Yearbook* 1973. Philadelphia: Jewish Publication Society, 1974.

3. Mr. Markowitz's article provides the basic data on this problem.

fect upon Federation-agency relations, I do not mean to oversimplify a highly complex question. I have had firsthand experience in many communities with the problems of attitudes, personalities, history, relationships and the way in which the problem often tends to be discussed in terms of good guys and bad guys. It is not my purpose to belabor this issue. My limited purpose is to stress that we are faced with an increasingly critical situation which has serious implications for both Federations and agencies, and that they will both suffer if they do not develop a positive program of mutual understanding and action.

Is there a basis for such a positive program? Is there something Federations and agencies can do to reverse the trend or to at least create conditions which might provide a basis for greater optimism? I believe there is. It seems to me that there are four major areas in which Federations and agencies can mobilize themselves to deal effectively with the problem.

Agency Responsibilities

a. Board Composition

In many communities where local services are sponsored by independent agencies, people are elected to boards who are inadequate contributors or even non-contributors. There is often no policy or established practice, either in the agency or in the Federation, related to board giving. One of the truly puzzling phenomena in Jewish communal life is the paradox that people who are presumably most familiar with the needs and exert the greatest pressure for increased allocations are often the ones who are among the less generous contributors to the campaign.

We in Federations know that the best support of agencies comes through people, that people who are close to Federation have the best opportunities to interpret agency problems and needs, and that adequate contributions to the campaign help to create Federation acceptance of the in-

terpreter. This does not imply that every board member must be a larger contributor. It does mean that he or she should be seen as a generous contributor in relation to available resources.

The entire question of lay leadership and fundraising requires some elaboration. In too many quarters it is considered somewhat crass and materialistic to emphasize the importance of fundraising. It brings forth comments on the materialistic nature of Federations, on their emphasis on big contributors to the exclusion of others in the decision-making process, on an overemphasis on Israel to the denigration of local services, and the implication of elitism and absence of democracy. Those who are familiar with Federations and their structures and functioning know that these are traditional impressions which have not been true for some time. However, such impressions in the American culture tend to inhibit frank and open discussions about the importance of money. This issue must be faced much more openly and honestly by agency lay and professional leaders, and without ambivalence about the major importance of fundraising, and with a readiness to do something about it.

b. Service Dimensions

From the point of view of constituent agencies of Federation, there is probably no issue of greater importance than that of their service programs. To say that Federations are developing their own views and priorities about service dimensions and directions may be true, but that in itself does not begin to deal with many related complex professional questions of knowledge, skill, client and staff attitudes, needs and financing.

In a number of ways agencies have responded quickly and constructively to such major Federation concerns as the changing needs of the elderly, single parents, children, and other areas of service. The one area of service where there

has been no significant or major response has been that of strengthening Jewish identity. I have discussed the reasons for this in another paper.⁴ Briefly, I pointed out that the entire question of strengthening Jewish identity in agencies has been enormously oversimplified; that there has been no clear definition of key terms and objectives; that communities have not, up to this time, expressed a clear viewpoint on the issue; that there are complex and unsettled questions of knowledge, skill and method; that major fiscal implications have not been faced and considered, and other aspects.

It is clear that the addition and strengthening of a major Jewish identity function may well mean the reduction or elimination of certain traditional services with which agencies have been identified for generations. This suggests that there is an urgent need for joint intensive planning discussions between Federations and agencies around such questions as: what are the implications of the proposed changes, professionally, fiscally and from the point of view of the client group and the community?

Above all, there must be the realization on the part of the agency that the fundamental issue is one of survival, for Federation as well as the agency. The need for action may not be immediate, but it may be here sooner than many of us think.

c. Outreach, Interpretation, Community Organization

A third area in which agencies can be specially helpful to Federation is that of outreach, interpretation and community organization. As Jewish communities become more and more dispersed, a major way to reach people is through services. Local area committees can be created to supervise outreach programs. Special pro-

grams interpreting overseas, national and local needs can be developed. Volunteer participation in agency services can be encouraged. Local residents can be appointed to agency boards. Agency board members can accept special campaign responsibilities in outlying areas. The situation is pregnant with possibilities.

Federation Responsibilities

Federations can also intensify efforts to meet the newer challenges. Some of them are doing a number of creative and successful things, but many still have a long way to go, particularly in the areas of leadership development, the planning operation and its relationship to budgeting, organizational structure and building bridges between the older and younger generations.

a. Leadership Development

It may seem redundant to the point of absurdity to belabor the fact that a major factor in success in any communal endeavor is leadership. Leadership development is now a primary function of Federations, but it must also be said that in a number of communities the leadership picture is not as effective as it might be. The viability and success of the American Jewish Federation stems primarily from its ability to raise money, but we often see leadership development programs which have little or no relation to fundraising. They consist of social and educational programs for relatively large memberships, with relatively minor emphasis on fundraising. The rationale for this practice is that the programs are primarily for the purpose of bringing people into the community and to ultimately educate them for fundraising and other activities. That may be a valid objective but the experience demonstrates that in these programs fundraising does not often become a major activity or emphasis.

Therefore, one clear guideline for action is to make a clear distinction between

4. "Jewish Identity and Agency Function," *Journal of Jewish Communal Service*, Fall 1983, pp. 28-33.

education for community participation and leadership development, and to restrict the concept of "leader" to a relatively few people who have the commitment and ability to lead. Such people are often in evidence if we take the trouble to look for them. They show their potential by what they do, by how they take responsibility, by how they influence others, by how they contribute to and work in the campaign, by the leadership role they take in synagogues, organizations, agencies and other areas of activity, and by their evident commitment to Jewish life. They are necessarily a small group and for them there have to be special kinds of briefings, educational and training programs, selective placement and creation of leadership opportunities.

If leadership means anything at all, it means setting an example, and in a Jewish Federation, how we contribute money is one of the most important ways of setting an example. This matter of giving is even more important today in a period of stringency which may worsen as time goes on.

b. Organizational Structure

In a number of Federations, the structure provides for organizational representation on the board, sometimes to the point of such representatives constituting a majority of the board. The experience has been that many of these representatives may have little or no interest in the campaign, do not contribute adequately, and often do not assist the campaign in any way. At the same time, they are in a position to set policy, and the policies they set do not always reflect the preferences of the contributing community. A number of Federations have seen the problem and have dealt with it but others have not. Sooner or later, and, one hopes, before it is too late, it will be accepted that no person should be a member of a Federation board unless he fully supports the objectives and programs of the Federation, and such support requires adequate financial support.

c. Planning and Its Relationship to Budgeting

Colleagues in Federations will forgive some plain speaking about planning and its relationship to budgeting. There are certain sacred cows that are not often milked, but the situation requires plain speaking.

Planning and its relationship to budgeting is a matter of recent development in many Federations. Although they have always been referred to as basic and essential functions of Federations, they have been well developed only in a number of the larger Federations, in which the structures and processes were adequately implemented with staff and sophisticated decision-makers. As conditions and pressures compelled greater attention to these dimensions, planning structures have been created in many Federations but with varying results.

Frequently encountered agency views are that decision-makers do not have a sound knowledge of agency functions and services; that Federation policies are not always clear, and that they are arrived at without adequate agency participation; that Federation communication from staff is often inadequate; that there is no significant relationship between planning and budgeting. While these Federation-agency differences and tensions are traditional and, to a certain extent, inherent in the Federation-agency relationship, the agency views are sufficiently widespread, similar and consistent to warrant more careful consideration of the problems on the part of Federations.

d. Relating the Generations through the Identity Crisis

There are many aspects to what is referred to as the "generation gap," but in this discussion we are concerned with one major aspect, namely, the growing tension between an older generation, which gives most of the money based on a primary interest in Israel, and a younger generation,

which contributes on much lower levels, but which tends to stress the importance of local services. It would, therefore, seem obvious that there should be bridges being built between the two groups; that intensive interpretation programs should be part of an intermingling of leadership in campaign, agency boards and Federation board and activities.

It is therefore surprising to see how little is being done along these lines. While there is a natural intermingling of both groups in the normal course of communal events, there appears to be a minimum of consciously directed effort on the part of Federations. There have been very few organized and consistent efforts to interpret the basic problem of the weakening sense of Jewish identity and its implications for the future. Too often we see communities in which there is little or no awareness of the potential of bridging the gaps through programs focused on the Holocaust and on Israel.

This suggests another major guideline for action—the establishment of a Federation committee with specific responsibility for building bridges between the generations, through consistent strengthening of Boards of local agencies with contributors primarily interested in Israel; by programs which focus on Israel for those with a primary interest in local services.

For example, a number of communities have had excellent results with missions to Israel and mini-missions to local agencies. If the fiscal outlook is one of fiscal stabilization or decline, the outlook is not a favorable one for local services. For the foreseeable future, there will be no lessening of the needs of Israel, nor will Federation campaigns be able to shift significant amounts of money from overseas to local needs unless there are changes in attitudes among contributors.

What we can do is build into our operations those structures and processes

which will create bridges of mutual understanding and prepare the community for such changes as may be mandated by changing conditions. Let us never forget that in the final analysis, it is the contributors to our campaigns and their attitudes which will determine the future service directions of our communities and agencies. It cannot be assumed that our service programs will be here forever. They will be here only as long as enough people are ready to support those programs, and that will depend upon what we do to insure that support.

SUMMARY

The problem of the future of local services is a serious one and presents challenges to Federations and agencies. It requires clarity and conviction on the part of Federations about their central role and responsibilities. That role is based on the realization that it is no longer possible to do business as usual in the allocation of funds. Conditions and the growing fiscal stringency requires new approaches, more thinking and planning and an awareness of the need to be less reactive and more assertive. The Federation is the closest thing we have to an organized Jewish community, and, as such, it has the responsibility to insure the creative survival of that community. Creative survival must be converted from an abstraction to concrete programs.

Agencies can do much to strengthen the central agency and thereby strengthen themselves. They can become vital instruments in the development of community leadership and strengthening the campaigns which provide their sustenance. "Independence and autonomy" have to be redefined in terms of the new objectives and responsibilities. The focus now has to be on common objectives to ensure survival of the total community and its service programs.