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79th ANNUAL MEETING NATIONAL CONFERENCE
of JEWISH COMMUNAL SERVICE
June 5—8, 1977
Shoreham Americana Hotel, Washington, D.C.

Can the Future of Federation be Shaped by the Jewish Community Organization Process and a Grand Design?*

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To be "communal" a Federation does not necessarily have to be all-inclusive geographically, functionally or fiscally. It need not feel the pressure to include all the services in the area, nor all varieties of programs for large and small groups. It need not feel the obligation to finance "everything Jewish". But the services it does include and support should meet other criteria, communal in character. They must meet the test of common consent or consensual planning and fiscal responsibility to a central body, readiness to yield to changing priorities cooperatively determined, leadership whose loyalties reach beyond the parochial, acceptance of standards centrally established, etc. These characteristics, associated with the Federation idea, can help shape the growth of the Federation movement.

In most instances, Federation began as a voluntary association of community service agencies. Its objectives and its functions were relatively mechanistic: to raise the level of financing, to eliminate competing fund-raising, to improve the quality of service.

It was an idea that worked. It attracted people and programs that sought affiliation. In the process, Federation took on a personality which vested it with qualities which were partly real and partly wishful anticipation. The base of support broadened; the area of program interest widened. The dream of a future for Federation as "the organized Jewish community", in an organic sense, and the drive for its fulfillment gained momentum.

In the course of the gradual growth from the original association of local agencies to the broader organized Jewish community, Federation is confronted with numerous proposals for expanding its function. Some of these are from applicants for financial support who are ready to participate in some variation of affiliation. Some are from organizations seeking affiliation without financing, at least at the outset. In different cities the nature of

affiliation takes a variety of forms, i.e., a member agency, a beneficiary, an organization with Federation board representation. In some instances, a beneficiary gets deficit financing; in others, it gets a grant based on a formula, sometimes developed to justify the grant. However, the basic structure still consists of local member agencies which receive deficit financing of an approved budget.

Pressure for Wider Base

The pressure for a wider base of services does not consist of external requests alone, but of those from insiders—proposals of existing member agencies or suggestions by sophisticated laymen who see a communal need they would like their Federation to fill.

This is the case, more or less, in highly developed Federations and well-organized communities as well as in the more primitive communities where there is less sophisticated recognition of the inherent limitations of the Federation as a voluntary association.

For the most part, Federations struggle with these proposals, item by item, and tend to resolve them on a pragmatic basis, community by community. This process usually takes place without the help of objective guidelines. Instead there is the "gut feeling" on the part of local Federation leadership—lay and professional—that it would be "a good thing for

*Based on a paper presented at the Large City Executives meeting (Council of Jewish Federations and Welfare Funds) at Ojai, California, July 18, 1976 as a background for discussion.

the community." Sometimes the decision to add a new affiliate is made without enthusiasm on the assumption that taking no action might be worse than taking positive action.

A day school applies for help. The application is supported by some important leaders and contributors. Many people agree that the Federation has no business supporting the particular day school for the standard reasons:

- It has not demonstrated fiscal responsibility.
- It competes with public schools.
- Most contributors would object.
- The money would have to come from other more desirable projects already included.
- Its deficit is so great Federation could not undertake to provide it without authorizing some form of supplementary fund-raising.
- Too many people oppose day schools in general.

But the justifications are easy:

- This request may be only for a loan.
- Assistance now does not commit the Federation to continued support.
- Teachers may go unpaid if the help is not forthcoming.
- It will demonstrate to a number of important people, including significant contributors, that the Federation is in fact interested in intensive Jewish education.
- Where else can a needy Jewish institution turn?

Almost the same portfolio of arguments is applicable with minor modification to the request for a grant without any commitment for annual renewal or where continuity is implied. The request could be from a synagogue or a burial society or a rabbinical council—or even a new hospital.

Evaluation Is Pragmatic

The same general type of pragmatic evaluation has taken place for several decades now in the major Jewish communities of America, and Federations have gradually

modified their basic posture to include previously peripheral programs—sometimes grudgingly and sometimes enthusiastically. As a result, there is an unevenness among communities and the whole subject has become a matter for lay and professional concern, increasingly in the last decade. What is pragmatic for Los Angeles may not be for Detroit. "One man's swimming pool is another man's *mikvah*."*

In July of 1975, Bernard Olshansky of Boston, delivered a paper (unpublished), "Issues in Considering Financial Support of New Kinds of Beneficiaries," and precipitated an intense discussion among executives of large city Federations. He said in part, "...there will have to be new patterns of allocation and approaches other than the deficit financing which we find so intellectually comfortable...When there are pressing issues of Jewish life, when there are serious concerns about Jewish continuity, when there are valid expressions of Jewish responsibility, we feel obliged to lend our assistance. This is as it should be. But it will present us with problems which we will not always have the wisdom to resolve." Olshansky recites a long list of the kind of items which have come to Federations for support. It is by no means exhaustive. It includes:

- Direct support for synagogues;
- Costs for synagogue security;
- Financial support for the maintenance of *Minyanim*;
- Underwriting programs in new neighborhood synagogues such as youth programs, schools, adult education;
- A campus journal published by rabbis;
- A campus journal published by students;
- Golden age programs in congregational buildings;
- Financial support for independent model schools, i.e., campus, ideological, organizational;
- Day schools;
- A variety of social welfare programs

*Observation by Isidore Sobeloff in contrasting U.S., domestic and Eastern European (JDC) needs.

including a residence for the mentally retarded;

- Chaplaincy service;
- Financing or support for research in the peculiarly Jewish diseases;
- Support of programs for continuous communication with Jewish families in the Soviet Union;
- Open universities;
- Media centers;
- Drug centers and halfway houses.

These requests for support are sometimes associated with proposals for affiliation and sometimes not.

Tested By Process

There were two major thrusts in the discussion which followed: one, that we need to set these issues into a framework of a "grand design"* for the future development of Federations and two, that we need to establish criteria we can use in making judgments about our relationship to these new programs. This latter test came to be labelled "the community organization process" and the question was formulated as follows:

Are these new programs of groups knocking at the door of Federation subject to the Jewish community organization process?

In the discussion, the disconcerting question was raised as to whether all of our *present* beneficiaries (such as hospitals) are subject to the same community organization process.

In general, this test has a number of components:

1. Has the new applicant demonstrated fiscal responsibility? Will it be able to accept a central decision regarding its total budget and live within that decision? Or, are there forces which compel it to give secondary importance to fiscal responsibility: for example, the school that insists it has a responsibility to register any child without reference to ability to pay, even if this means operating with an unauthorized deficit?

*Grand design concept introduced by Robert Hiller, Baltimore.

2. Can it subject itself to central planning? Will it expose its desire to plan a new branch or add a new department to central communal review?

3. Can it participate in joint cooperative planning and become a member of the family of Federation services with all this implies? At one extreme such participation may mean going out of business or being integrated with another agency.

4. Can it be part of a deliberative process in which it is a full participant rather than implementing a program or philosophy determined (or pre-determined) elsewhere—in the office of a national agency of which it is an affiliate?

5. Is it in a position to yield to jointly determined priorities and timing in relation to Jewish life and Jewish problems?

6. Do its leaders and members have a demonstrated stake, beyond their parochial interest, in the larger Jewish community program?

7. Does it have the kind of quality of service which has characterized Federation programs and which reflects positively upon the organized Jewish community?

8. Will it serve as a resource for leadership in the organized Jewish community and will leaders of the community be attracted to participate in its governing body? Just as institutions may not be amenable to the community organization process so leaders of organizations may not be amenable to the same process by virtue of lack of flexibility or because of fixed ideological commitment too limited to accept other communal programs.

9. Will the new affiliation help make additional funds and other resources available for all Federation beneficiaries? Will it add to Federation's fund-raising potential?

10. Does Federation have the capacity to absorb the new applicant at the particular time? Federation may have more affiliates than it can handle or a disproportionate number of peripheral ones to absorb in any specific period.

11. Are the services rendered a matter of current or potential concern to a numerically

broad segment of the Jewish community? Or are they of importance only to a small number of participants?*

If we try a few theoretical examples of the application of these criteria, we will soon find that they do not replace judgment. No present nor potential affiliate will satisfy the list in full. But the criteria can very well reinforce judgment when applied with a sense of balance replacing purely subjective pragmatism.

Impact on Grand Design

The one major test which needs to be applied consciously with reference to any decision regarding a new beneficiary is: What will it do to the status and strength of Federation? Will the result of this action make it easier or more difficult for Federation to carry out its basic program of fund-raising, budgeting and community planning? This is the most sophisticated community organization concept. It is often applied unconsciously as an impulsive reaction by those who are most deeply identified with the Federation as an instrument of Jewish life.**

This is a part of the "grand design". It deals with our image of what Federation should strive to become and, in this context, raises the

*In the discussion James Rice of Chicago, with particular reference to national programs suggested two additional criteria; one dealing with the level of ethical standards and a second dealing with relationship to the larger non-sectarian community.

**There are some communal leaders who feel that we should rise above what appears to be an institutional conception of Federation. They would state the test questions differently. For Example: What will it do to the status and strength of the community (rather than of Federation)? I find this the subject of a different kind of discussion. Everything one believes in can be "a good thing for the community" and the test again becomes entirely subjective, losing its utility.

The whole question of equating Federation and community deserves more and separate attention. It can only be dealt with peripherally here. Federation as an institution has specific functions. The "community" is considerably more loosely defined. It is not a voluntary association.

questions: Will this new agency or this additional service help move Federation in such a direction? What are the aspirations of Federations? There are a variety of opinions, but we can assume basic general agreement on the following objectives:

1. To increasingly become the "organized Jewish community" (without ever necessarily fully attaining this objective) by widening the circle of inclusiveness—people and programs.

2. To increase its impact as an instrument of Jewish identity—one with which increasing numbers of Jews are proud to associate.

3. To deepen both the quality of Jewish life and the quality of life of the Jewish population. This means moving forward in the area of Jewish cultural and spiritual programs and maintaining a high level of the necessary communal services in the health, welfare, security and other traditional areas.

4. To develop a base of homogeneity in the sense of *K'lal Yisrael*, Jewish identity on fundamental issues without erasing all differences to a level of indifferent unanimity. This simply means developing a greater stake in community among a greater number which can serve to override partisan parochialism without stifling it.

5. To increasingly become the Jewish "address" vis-a-vis the general body politic, other coalitions, ethnic groupings, etc.

The "grand design" includes establishing flexible objectives—even somewhat idealized. Applicants for affiliation can then be considered in terms of whether they will help to move Federation toward these objectives. This is a test beyond the question of what impact their inclusion will have on the status quo.

There is an assumption in all this that we will continue the basic characteristics of the Federation as we know them. These characteristics have to do with the foundation for the grand design. It goes beyond mechanistic features such as deficit financing and even its extension to fiscal accountability.

On the other hand, some may have a different objective for Federation. It could become a central fund for financing of a polyglot of undifferentiated causes and pro-

grams loosely held together by fiscal restraints. It could give up its dream of a communal identity beyond fund-raising. In some cities this aspiration is more remote, in any case. Such a Federation needs no sophisticated criteria nor design. It is also a useful communal body, but one quite different from the hope inspired by 75 years of Federation experience and growth as we know it.

The relationship of the synagogue to Federation deserves special and separate consideration since it is the largest institution of the organized Jewish community outside the main stream of Federation. The rhetoric, both positive and negative, about Federation-Synagogue relations is abundant. Much of it serves to confuse or distort the central issue. It deals with atmosphere—friendship or antagonism; cooperation in providing community service or competition for community resources, i.e. leadership, financing.

It often shakes down, when the euphemisms are brushed away, to how can the Federation be helpful to the synagogue and/or how can the synagogue be helpful to the Federation movement. When this is recognized as a mutual opportunity, it achieves the highest level for our times. To understand such a relationship clearly, it must be distinguished from the question of organizational integration. Can the Federation become an adjunct of the synagogue movement? Can the synagogue become a member agency of Federation? The focus on these questions often leads to frustration and hostility. At best they seem premature in the present stage of American Jewish life.

Relating to Synagogue Movement

The synagogue "movement" does not really exist as a unified force. The Orthodox congregations in many ways have less in common with the Conservative and Reform congregations than do the unaffiliated. They will not use the Conservative and Reform facilities. They will not be a party to encouraging affiliation in Conservative and Reform congregations. There are wide variations within the Orthodox group, some of the affiliates of which are closer to the Conservative group and

even more amenable to Federation relationships. Congregations are not entirely local autonomous bodies. Their major affiliation is with a national Orthodox, Conservative or Reform body which determines many of their policies and approves many of their programs.

Against this background, a congregation often does not have the same flexibility for affiliation with the local communal voluntary association as does a children's clinic or a home for aged or a local Jewish school. The autonomy of its member constituents is more limited as regards policy, integration with other groups and programs.

This does not necessarily mean that relationships cannot be developed between programs of congregations and Federations. It does mean that these relationships will have to be different in nature and that they might change the present character of Federation as central communal bodies. An illustration of a kind of accommodation is found in the Detroit United Hebrew Schools arrangement whereby the communal school operates branches in synagogues with sufficient representation of the synagogue leadership to assure than on the one hand the synagogue policy will not be violated and to assure the Federation on the other that conditions of an affiliated Federation agency will not be distorted.

This type of affiliation also serves to illustrate a more basic element of useful association. The UHS is a member agency of Federation. Together with the Federation planning body, it recognizes the need to serve a new Jewish neighborhood. It could project a new branch building. Instead, it approaches a synagogue with plans for that neighborhood or with a school building already available. It offers to rent the facility for weekday afternoon classes open to the entire area. The primary objective is to carry out a Federation agency program. The synagogue can be helpful without doing violence to its own institutional integrity. The income to the synagogue, though important, is incidental to the essential thrust of the arrangement.

In a sense, the illustration serves to demonstrate the application of the sum total

of the community organization criteria and the grand strategy.

Whether by the use of criteria or by natural intuitive reaction alone, Federation could not be expected to develop a perfectly symmetrical structure and program. On the other hand, it needs to be protected from becoming a Rube Goldberg organizational contraption.

In carrying out its own priority program and that of its agencies, Federation can constructively develop relationships with other community institutions—synagogues, schools, student groups, etc. Where the emphasis on these relationships becomes primary and the program advanced is remote from Federations' priority objectives, the issues are sharpened. Here the criteria for affiliation (the community organization process) and the Federation grand design should be useful in making a central decision. In this connection, Federation cannot justifiably be criticized if it seeks to protect the existing array of services, especially if these, as a group, are balanced, effective and amenable to improvement. Adding to them in number does not necessarily make a better communal body. Some Federations may already include more affiliates, beneficiaries or associations than can be manageable through an effective community organization process as we know it. The addition of new affiliates, especially those which require unorthodox forms of association, may present an opportunity for testing and proving the validity of the Federation idea—if we can be sure they will not stretch it out of shape nor do violence to its basic objectives. The availability of endowment funds makes experimentation possible along these lines. It also offers a temptation for a

form of financing outside the Federation process.

To be "communal" a Federation does not necessarily have to be all-inclusive geographically, functionally or fiscally. It need not feel the pressure to include all the services in the area, nor all varieties of programs for large and small groups. It need not feel the obligation to finance "everything Jewish". But the services it does include and support should meet other criteria, communal in character. They must meet the test of common consent or consensual planning and fiscal responsibility to a central body, readiness to yield to changing priorities cooperatively determined, leadership whose loyalties reach beyond the parochial, acceptance of standards centrally established, etc. These characteristics, associated with the Federation idea, can help shape the growth of the Federation movement.

Clearly, the Federation is an imperfect mechanism reflecting many of the imperfections of the people who participate and the society in which they live. Its strength often comes in deliberate restraint essential to voluntary consensus. Sometimes the challenge of new programs and new directions and new affiliations seem to threaten Federation's institutional survival and development. Consciousness of the Federation method of operation and long-range objectives can serve to measure the reality of these dangers. Such consciousness requires awareness of the foundation stones of the community organization process and of our grand dream which we aspire to realize. We can serve it better when they are defined and deliberate—even if subject to change.

Occupational Values and Ethics in Jewish Law and Lore: Premises for Jewish Communal Service*

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...(in this article) I am not discussing the spiritual implications or purposes (of holy writings). I am discussing only the substantive import they seem to carry for occupational values and ethics. If the only effect is to illuminate what impress me as profound and heuristic premises of occupational values and ethics, I shall have in large measure succeeded in my modest attempt.

Boundaries of Presentation

I approach the subject matter of this paper with great humility and perhaps even greater uncertainty. I say this not because my purpose is not clear, but because my purpose is limited. And therein lies the rub, since it increases the probability that I will be misunderstood.

What I mean to do is to draw on a few—a very few—selected Jewish sources to illuminate the contextual framework of occupational values and ethics, particularly that of the human service occupations which operate in Jewish communal services. But I do not mean to do this from a religious or theological point of view, even if they may be regarded as relevant to my limited purpose. This requires a rather literal reading of the sources I will tap, with no presumption of either consistency or inconsistency with a religious or theological interpretation. Whether the purpose I have chosen is an acceptable one I leave to others to judge. That it can be a useful one I have no doubt.

* The William A. Rosenthal Memorial Lecture, presented at the Annual Meeting of the National Conference of Jewish Communal Service, Boston, June 1, 1976.

** I would like to acknowledge with gratitude the assistance of Mark B. Greenspan, rabbinical student at the Jewish Theological Seminary and, through him, the library of the Seminary. I would also like to thank my colleague, Dr. Irving Levitz, who is a rabbi as well as a psychologist, for his wise and understanding counsel. Neither, of course, should be held to account for flaws and errors in this article for which I must retain sole responsibility.

The spirit with which I venture this discussion is similar to that which has guided Freud and other scholars, and to that which has influenced Stoppard and other authors. When they have mined the Shakespearian and other literary fields, they have not done so in the illusion that they have seen in plots, characters, and developments of writers of the past what those writers saw, but only that which is visible, perceptible, and understandable in what they wrote. The literary products of Freud, Stoppard, and others, when they derive insight from writers of the past, are not presumed to argue a theory, or document a hypothesis, but rather to reflect those insights and afford understanding of human character, behavior, experience, and development.

This is what I propose to do with a few illustrations from the holy writings of the Jewish people. But I am not discussing their spiritual implications or purposes. I am discussing only the substantive import they seem to carry for occupational values and ethics. If the only effect is to illuminate what impress me as profound and heuristic premises of occupational values and ethics, I shall have in large measure succeeded in my modest attempt.

Another word of caution before I proceed, however: my selection of illustrations may not prove to be the most apt ones available or even the most indicative. These are not necessarily the "leading cases" in the sense that is employed in the judiciary which accords them the character of ultimate authority. My illustrations may not claim such a character, but they should serve to clarify the points I am trying to make.