Allocating to National Agencies—Priorities and Processes*

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JUST as fund-raising is the key to a federation's status as the expression of the Jewish community's solidarity and commitment, allocating is no less a basic criterion. It is the test of the federation's serious intent and effectiveness as the Jewish community's social planning instrumentality.

The processes of allocating to national agencies, however, often leave both federation and agency leaders dissatisfied. The federation people may feel, justly or unjustly, that they are rushed into acting without an opportunity to acquire understanding in depth; that they are in danger of responding to deception or pressures rather than to relevant and verifiable facts; that the national agency scene appears to be chaotic, competitive, and devoid of defensible planning and setting of priorities. The national agency people may feel, justly or unjustly, that they are forced into a humiliating posture of begging crumbs for essential programs from a constantly-shifting cast of uninformed local characters, whose only yardstick is the dollar, and whose discriminating approach to planning and priorities is: "Give them half!"

Why do these contrasting attitudes arise? Can both points of view be right? What can be done to make improvements?

Systematic Funding Process for Local and National Needs

Budgeting for or making allocations to local agencies poses difficult enough

problems. For instance: How wellbalanced is the community's program of services, as represented by the whole spectrum of needs and priorities presented for funding? On the basis of what evidence? Are the items carried forward still valid? Are there perhaps new needs that outweigh some of the carry-overs but that have gone unrecognized? To the extent that new items are presented, are they valid and can they be implemented effectively as they are Is interagency cooperation planned? optimal? Have alternative sources of funding been explored fully? In a situation of limited funds (and who can conceive of a situation in which funds are adequate for all needs?), how can the competing requirements of various services and the incompatible demands of their partisans be reconciled?

These and many other difficult questions are involved in any sort of systematic funding process for *local* needs. Every one of these problems arises in a much more complicated form when the allocations are for *non-local* services.

How are these questions resolved in funding local needs? They must in fact be resolved, whether well or badly, because the calendar moves along and decisions are finally made, at least for one campaign year.

Most frequently, they are resolved by some form of cop-out. I do not say this critically, but only in recognition of the limited capacity of any person or group or federation or community to do everything thoroughly at the same time.

The most frequent cop-out is to repeat the same pattern of allocations year after

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year, with only such minor or arbitrary across-the-board increases as may be required to meet glaring changes in living costs—or across-the-board slashes, in the case of financial disaster. Such pseudo-evenhandedness takes the place of selective action based on thorough restudy and a new informed consensus every year.

Another cop-out is to yield to reality in the alignment of partisan pressures, and to cave in completely to a very strongly supported demand, apportioning the balancing losses to the agencies with the weakest partisan support.

But in well-functioning communities, and fortunately they are not few, cop-out is not the entire story. Specific problems can be recognized well in advance of the point of decision, on the basis of demographic trends, a search within the community for analogues to changes discovered elsewhere, new ideas presented by national service agencies, changes encountered in intake, professional hunches, and so forth. Initial processes of study, discussion, and conciliation of views can take place prior to action, with common agreement on interim or holding actions when resolution on the basis of consensus requires more time than the usual schedule permits.

Under the skilled general stage management of the community organization personnel, the lay and professional representatives of the agency or agencies involved can take part along with lay people representing the broadest level of community leadership, sometimes calling in for expertise or consultation outsiders whose objectivity is accepted, academic specialists or professional leaders from other communities or from national service agencies. Sooner or later a new consensus emerges, and actions, while not necessarily unanimous and certainly not necessarily genuinely wise, have general acceptance.

If It Works for Local Agencies, Why Not For National Agencies?

Are the same kinds of processes applicable to a federation's allocations to national agencies? Unfortunately for the most part they are not, and even well-organized communities find it necessary to cop-out more often on national agency actions than on local needs.

There are at least three preconditions for the success of the local allocations processes that in general are not available in the same way when a community is dealing with national questions. They are seldom explicitly recognized as important, because they can be taken for granted when a community is dealing with local affairs. These are:

- 1. There is a substratum of familiarity with the problems among all the local participants, lay and professional, partisan or objective, because of day-by-day contact and input. Every aware person in a community knows about the center, knows about the home for the aged, knows about the community relations council, or any other local service, through the accumulation of personal experiences and observations and anecdotes of other people's experiences. While a good deal of misinformation and bias may enter in this way, it still provides a base for meaningful involvement. Very often, in regard to national agencies' activities and services, the best informed local lay leader may really be in the position of a man from Mars. He has to start with the ABCs before he can understand what is involved, and that takes patience and time that few will devote or can afford.
- 2. The second precondition, then, is time. With the possible exception of outsiders brought in to consult, all the significant actors in a local decision are in the same metropolitan area. There can be whole series of lunch-time and evening

and even breakfast meetings, there can be subcommittees galore as may be indicated. No significant personal expense, time off from business, time away from home, is required. The local character of the problem makes extensive process feasible. When a community deals with a national agency, however, either it must send people to meet with national representatives—obviously only on sparing occasions—or bring national agency lay and professional people in, which can be an expense and a burden, or, as is attempted at times, deal with some local people associated with the national agency; but these are frequently unrepresentative, ill-informed, and unable to speak for the agency officially.

3. Beyond the mechanics of the process, the local scale of a problem makes it manageable in a way that problems regarding national agencies are not. This is a qualitative difference, not just a matter of degree, or at least a quantitative difference that approaches a qualitative difference. Whatever action a federation takes on a local allocation is likely to be comprehensive and decisive. There is, on the other hand, a well-grounded feeling of futility when one community deals with one national agency, or at least, with a big agency.

By way of analogy, let's assume that a perfectly peaceable brontosaurus has unwittingly dropped its tail on a caveman's toe, and the man would like to free his toe. What shall he do? If he whacks the tail with his club, will the message ever reach the beast's brain? And if it does, might not the response be a twitch that will remove his head as well as his toe?

Of course, a few very large cities deal with national agencies on more nearly even terms, but the problems are essentially the same. And national agencies that are disposed to do so may whipsaw even very large communities, pressing them to duplicate actions in other cities more favorably inclined to the agency's approach.

National Agencies Are Different

There is a genuine difficulty posed by the fact that so little of any national agency's services are a) visible to and b) controllable in a particular community. This is as much a problem to the national agency striving to explain its needs as it is to the federation trying to systematize allocation.

One criterion that many community leaders attempt to apply is: "What do you do for our community?" tunately, this criterion is applicable only to a certain category of national services, those that involve visible national help to activities that are themselves visible within the local community; e.g., supplying architectural advice in building a new center, or placing a new director for the Bureau of Jewish Education. But what about the many services that are simply not measurable by the yardstick of local visibility, such as being alert to new trends, conducting investigations or research on general problems of the Jewish community, developing significant new publications or audio-visual materials, setting of general standards, interpretation in national media, maintaining national contacts (e.g. with public officials, church and labor and business and other kinds of organizations, and so on), and any number of others? This kind of misguided effort at evaluation in itself tends to stimulate excessive reliance by hungry and desperate national agencies on public relations razzledazzle.

The beginning of wisdom for a community in attempting to assess priority national needs for allocations, in my opinion, is to recognize that most national agencies have a character different from that of most local services and make a distinctive contribution. The differences inhere, first of all but not exclusively, in the fact that the services themselves complement rather than parallel local services, and may therefore be valuable to a community even when not conducted in the community and not visible there.

Secondly, and no less significantly, the fact is that national services are in many cases offered by organizations with constituencies. That is, they may have partly the character of a "movement" as well as that of any agency, and the relationship is sometimes indissoluble. Thus, in approaching the setting of priorities, it is necessary to recognize that what is more urgent and important to one group or denomination or ideology in Jewish life may be less urgent and important to another, with neither view right, and neither view wrong.

The maintenance of pluralism within Jewish life is as valid and necessary as within American society generally. The object of setting priorities can hardly be to submerge or banish or vanquish one voice or one approach in Jewish life by putting it at a financial disadvantage in relation to its competitors. But—and here process again becomes vital—a truly balanced community approach becomes possible only within the framework of a voluntary cooperative planning process.

There are obligations on national agencies to participate freely in joint cooperative processes and to exercise understanding and forbearance in conflict situations. But the initial responsibility is that of the federation, since it is each community's social planning arm.

What, then, can be done by federations to develop a process of allocations for national agencies as attuned to changing priorities and as satisfying and generally effective as that in relation to local needs? Three things, in my opinion:

1. Strengthen and participate more actively in the LCBC process, which through a voluntary cooperative effort of

the national agencies and of a number of communities acting together comes close to supplying, at minimum cost in time and energy to agency and federation, an analogue to the local process that, however, is adapted to work at the national level.

- 2. Strengthen the national agencies' effectiveness, and recognize that genuinely complementary relationships exist between local and national services, calling for mutual respect and facilitation. In particular, strengthen the national service agencies in the various fields, which provide direct links field-by-field between local services and local leadership, on the one hand, and national agencies functioning in various specialized areas. This can help clarify priorities in each field.
- 3. And, finally, strengthen the local processes of allocating to national agencies by utilizing these two mutually reinforcing chains of relationship with national agencies. This can be done by:
 - (a) sending more significant people to participate more actively in the work of the LCBC and that of the national agencies;
 - (b) involving these people, who have access to understanding that others in the community may lack, more actively in consideration of the national agencies' allocations requests, by placement on the appropriate committees and subcommittees; and
 - (c) having people really study and really try to understand what comes into the community on paper from the CJF and the LCBC and the national agencies, with direct communication for clarification when that is required.

This way is not easy, and it is not cheap, but it may be effective, and therefore worth the effort.