

Guidelines in Federation Planning For Local Health and Welfare Services*

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THIS discussion attempts to provide some general guidelines for planning health and welfare services in the organized Jewish community. It is based on the conviction that such guidelines are more urgently needed than ever in a world in which rapid social change is profoundly affecting the nature and scope of Jewish responsibility for social services.

Change and Challenge

Up to about 1960, clarity about the role of Federation in sponsoring social services was not a major problem. There was continuous discussion of many planning and policy matters affecting agency services, emphases and directions, but there was no widespread or serious concern with the basic question of the validity of Federation sponsorship.

Historically, developments in Jewish agencies have generally paralleled those in the general field of voluntary service. Areas of service such as financial assistance and tuberculosis care were given up as they became public responsibilities. With the development of knowledge, professional training and skill, most Jewish agencies had changed, had eliminated or added new functions and services, and had generally kept pace with major professional developments in the various fields.

For the most part, these developments

in Jewish agencies were primarily related to sectarian considerations. From about 1930 to 1960, there was a primary preoccupation with professional concerns. Thus, Jewish family agencies were concerned with "core" services and new professional methods of helping; children's agencies reflected developments in child care, creating treatment centers, and sharpening placement skills; community centers were interested in a variety of technical considerations in professional group work; research and training became integral parts of our hospitals, institutions and other agencies. Questions about sectarian purpose and content were few and far between.

It was not until the middle and late sixties that there developed a serious and widespread concern about the validity of sectarian sponsorship of services, and an increasing interest in the question of which services were appropriate for such sponsorship.

A number of forces and influences have combined to create our present sense of uncertainty. Some of them are evident and well known, but others are less tangible. It is not my purpose to analyze them in depth, but rather to indicate briefly their nature and impact.

1) *Public Funds*

This impact is generally recognized and understood. While its importance has been greatest in the fields of physical and mental health, it has also had significant impact on the fields of institutional care of the aged and vocational service. The near future will see a similar impact on day care for children.

* Condensation of *Perspectives and Guidelines in Federation Planning for Local Health and Welfare Services*, New York, Council of Jewish Federations and Welfare Funds, 1972.

2) *Public Welfare*

An aspect of the impact of public funds is the proliferation of public welfare programs, such as medicare and anti-poverty efforts. With the projection of comprehensive health care, compulsory health insurance, major public responsibility for day care and the guaranteed annual income, there has been increasing question of the need for voluntary services.

3) *The Attack on Sectarianism*

This attack comes from three major sources:

- a) The black revolution, with its crystallization of sentiment among many white people for the elimination of sectarian sponsorship, the expansion of consumer involvement and control, etc.
- b) As the gap between needs and resources widens, there is pressure to coordinate, integrate and economize. This pressure has been particularly great on United Funds, and has been intensified as demands have increased for a greater share of the campaign for the ghetto and critical urban problems. The Funds are therefore raising questions about the continuing need for sectarian agencies.
- c) Jewish liberal sentiment, which has traditionally been uncomfortable about services which are sectarian in sponsorship or clientele.

4) *The Jewish Positivist Challenge*

As the problem of the weakening sense of Jewish identity with its threat to American Jewish survival has come to the fore, there has been increasing challenge of "health and welfare" agencies by Jewish educators, rabbis, and others are pressing for a shift of financial support to educational and cultural efforts.

Although the positivist often centers his specific attack on Jewish agencies

which serve the community on a non-sectarian basis (What's Jewish about a Jewish hospital?) he rarely makes distinctions. He leaves the strong impression that he wishes to see a major shift of financial support from all health and welfare services to Jewish education and cultural programs. He ignores the fact that a large part of the funds cannot be so shifted, since they come from the United Funds, but the insistent attack has aggravated the problem of those who must plan for the future of these agencies.

5) *The Jewish Professional Role*

A serious and not always recognized element in the problem has been and continues to be the position of many Jewish executives and other leading agency professionals. As questions have arisen, a number of them emerged as individuals with little or no sense of positive commitment to the Jewish community and its institutions. Even where there has been a degree of identification there was often no clear philosophy or viewpoint on the possible validity of sectarian sponsorship or clientele. Some professionals resolved their ambivalence by actively attempting to move their agencies away from sectarian sponsorship and affiliation; others have left the Jewish field; many have continued in their agencies with a sense of confusion and insecurity. While the recent past has witnessed some shift back toward Jewish communal identification, Jewish agency professionals have not by and large constituted affirmative force for the defense of a valid sectarianism.

6) *The Desire to Help in the Urban Crisis*

The urban crisis resulted in a very real desire on the part of Jewish communities and agencies to be helpful in relation to urban problems. Many effective projects have been and are being carried out.

At the same time, these efforts in a number of instances have troubling side effects, particularly in relation to maintaining traditional sectarian services. For example, some agencies, such as camps, felt they should convert to completely non-sectarian operations. In other agencies projects were mounted at the expense of traditional core services. In a number, Board members and staff began to question the continuing validity of services to the Jewish middle-class. The general result has been to heighten the confusion about Jewish agencies in the minds of many people.

Thus, from a variety of internal and external sources, Jewish and non-Jewish, there is a challenge to the continuing existence of Jewish social services sponsored by the organized Jewish community.

Response to the Challenge

Assuming the right of sectarian voluntary agencies to sponsor social services, how do we determine which agencies merit support? Sectarian voluntarism may be defensible in principle, but it does not therefore follow that all types of social services automatically qualify for Jewish community support. In a period of increasing public responsibility, the Jewish community must ask:

- 1) Is the service appropriate for voluntary support?
- 2) If it is, is it also appropriate for sectarian voluntary support?

Every experienced planner knows that within the highly pragmatic framework of Federation, philosophy and principle have not, up to now, been decisive elements in support of agencies. Rather, it has been a host of practical and immediate considerations such as history, fund-raising considerations, inertia, power structure features, personal and relationship factors, etc. In fact it is rare for community leaders and planners to

think and act primarily in terms of philosophy and principle, since their primary concern is necessarily the maintenance of viable communities in which there is peace and equilibrium. There is a profound reluctance to upset apple carts. Up to now such an approach has been a reflection of sound judgment and wisdom of community leadership. The evidence of this is the stability of the organized Jewish community and the success of its service efforts.

On the other hand, the climate of challenge and the pace of change make it clear that a purely pragmatic approach no longer serves to deal adequately with the problems. Too many people, Jews and non-Jews, are asking too many searching questions about sectarian sponsorship of services. The Jewish community, like other establishments, is challenged to demonstrate its relevance in the field of health and welfare services. It is beset externally by declining support from United Funds, and internally by pressure to meet new needs as well as greatly expanded old ones.

Basic planning decisions in Jewish communities will continue to be made in relation to many pragmatic considerations, but this does not relieve us of the professional responsibility to introduce and support those planning criteria which are related to some unified sense of Jewish communal purpose and direction. What is that purpose and direction?

The crucial question is, what are appropriate community objectives today for the American Jewish community in the field of health and welfare services?

Events of recent years have begun to crystallize one pervading Jewish concern—the concern with the gradual weakening of the sense of Jewish identity. This is expressing itself in many ways, but there is a growing consensus among responsible Jewish leadership in the organized Jewish community that the primary objec-

tives of the Jewish community are to insure the survival of the Jewish people, to strengthen the sense of Jewish identity, to develop unified community organizations and effective community programs, and to solve peculiarly Jewish problems to meet Jewish needs. There also continues to be a substantial sector of responsible Jewish leadership who believe that Jews should continue to strengthen the totality of health and welfare by supporting some non-sectarian services. I believe it is fair to say that this objective has become relatively less significant in recent years.

Therefore, in determining criteria of relevance for health and welfare services, it seems fair to assume that the major overall criterion is whether the agency in some significant way contributes to the sense of Jewish identity, and therefore to Jewish survival.

In many quarters in Jewish circles the words "identity" and "survival" have become catchwords. They are often flaunted like slogans, particularly when fiscal support is being sought. Thus, any effort in the field of formal Jewish education, no matter how unsuccessful it may have been in the past, is offered as a guarantee of identity and survival. There is a host of unproven assumptions as to which programs do or do not make for survival.

In the absence of hard and convincing data, any arbitrary actions on the elimination of agencies or services should be viewed with grave doubt. It seems sounder to apply a series of planning criteria which are rooted in history and are also related to the current conditions of change.

Jewish communities are guided by both positive and negative criteria. Positive criteria are the standards by which health and welfare agencies qualify for continuing support. Negative criteria are the standards which provide a basis for declining support.

The Positive Criteria

In attempting to determine criteria of relevance for health and welfare services in the Jewish community, it is possible to inject arbitrary viewpoints unrelated to tradition, current practice and thinking and existing constellations of power and influence. The art of the possible demands that criteria be closely related to these considerations. Such criteria would include the following:

1) *The Criterion of Traditional Values*

There is one group of agencies which with very few exceptions, have maintained their sectarian character. These are our family and children's agencies and institutions for the aged. This has not been entirely a matter of accident, tradition or inertia. These are the major services which were traditional in Europe and elsewhere, in one form or another. They represent those groups of people who constitute the primary objects of Jewish philanthropic concern.¹

In a period of confusion and uncertainty, it is this group of agencies about which there has been the least question on the part of Jewish leadership. It is in relation to this group that there is the least tendency to compromise on sectarian sponsorship, services and clientele.

Another way of putting it is that these agencies are considered to be particularly relevant to us as a Jewish group. They express in a very special way our history, traditions, values and sense of responsibility as a communal entity.² They are the kinds of symbols around which substantial numbers of Jewish people are

¹ Community Centers are not included in this group because they represented a relatively recent development and arose from uniquely American concerns of the 20th Century.

² See Charles Miller, "The Status and Future of the Jewish Family Agency," *Journal of Jewish Communal Service*, Spring, 1969, pp. 227-231.

ready to unite and which they are ready to support. They therefore express our need for community identity in a way which we feel deeply, but cannot always express clearly.

In a period of preoccupation with science, objectivity, efficiency and technique, there is a tendency to denigrate courses of action and policy decisions made on the basis of social, cultural, psychological and community considerations. That, however, is only an indication of how far we have moved away from the more spiritual and humanistic aspects of our communal existence. It is time to reassert these values, and to insist that their preservation is a priority.

2) *The Criterion of Immediate Relevance*

Service agencies may express historic values, but this in itself does not always make them relevant to those needs in Jewish communities which take on special importance in particular periods. They must be responsive to the changing needs which have special consequences or dimensions among Jewish people.

Current examples of these problems are generational gap and conflict, drug abuse among young people, college dropouts, relationships with college youth, the needs of the elderly, and others. Currently, these problems have special impacts and implications among Jews, and Federations have a right to assume that Jewish agencies will view them as priorities.

In the field of service to the elderly, the newer emphases are housing for the low income well elderly, institutional and non-institutional approaches to mental impairment, the many community based services to prevent institutionalization, etc.

Thus, the criterion of relevance applies in two ways; by being inherent in basic purposes and functions of agencies

that express traditional values, and by services which relate themselves to special aspects of Jewish need at particular times.

The agencies which currently meet the criteria of immediate relevance are family and children's agencies, homes for the aged, vocational agencies in certain circumstances, and community centers.

3) *The Specific Criterion of Jewish Identity*

All Jewish institutions are group symbols, and therefore contribute in some way, however small, to the group sense of Jewish identity. There is one agency that does so in a specific and major way—the Jewish community center.

The Center is often properly criticized for not always reaching its full potential in the area of Jewish identity. This should not obscure the fact that it does have tremendous potential to affect the Jewish identity of thousands of people through formal and informal cultural, social and educational activities. It is in a position to create special environments for Jewish living in its buildings and camps; its skills are well suited for the motivation of interest and the development of significant personal participation.

4) *The Criterion of Jewish Community Organization*

Just as Jewish institutions contribute to the sense of Jewish identity, they also contribute to the system, and therefore strengthen community organization. They mobilize sentiment and support; help train leaders, cooperate with other agencies, etc.

In this respect, the Jewish community center again has a special role to play. By its very structure, nature, and potential, it can be a major vehicle for community organization and problem-solv-

ing. This potential lies in its following features:

- a) It is usually the only major physical evidence and symbol of organized community in major concentrations of Jewish population. It is often therefore identified by many people as the one way in which the Federation serves them.
- b) It is the only agency which reaches, or can reach, substantial numbers of people of all ages, in all geographic areas, regardless of social, economic or ideological considerations. It can therefore be a great unifying force.
- c) Its activities relate to synagogues, organizations, youth movements, etc. What it does or does not do in relation to these groups can determine their attitudes towards Federation, the campaign, and general community needs and problems.
- d) By 1969, the Center had become the largest local beneficiary of central community funds in more than 90 communities. This alone was focusing increasing Federation attention upon the Center and its programs, its rationale and its significance to the organized community.
- e) Centers and Federations have basic common concerns, such as the problems of identity and survival, college youth, development of leadership, interest and participation, the generation gap, relationship with the religious sector of the community, etc.

While the community center has the greatest potential for strengthening Jewish community organization, other agencies can also play a vital role. For example, any agency which, as a result of

its special viewpoint and training, produces "across the board" leaders is making a vital contribution. An agency can strengthen "community" when it is helpful to sister agencies in Federation, consistently cooperating with them. An agency can serve as a focal point for the interpretation of broad community needs and problems. Sometimes an agency expresses all of these and additional community dimensions, and thereby becomes an important instrument in strengthening the organized Jewish community. Such considerations may well be as important as the service itself in determining the extent of community support.

5) *The Criterion of Public Relations*

From the very beginning of Jewish life in this country, the relationship of the Jewish community to the general community has been a matter of major Jewish concern. While this factor is not the powerful influence it once was, it continues to be important, particularly in the larger Jewish communities, where certain agency programs are seen as having significant public relations value.

There is a tendency in some Jewish quarters, particularly since the overwhelming impact of the great campaigns for overseas purposes, to overlook or minimize one of the most characteristic elements in American Jewish life; namely, the way in which our Federations and agencies have been a major expression of Jewish acceptance of American civic responsibility. Their services have provided one of the most effective mechanisms in the achievement of Jewish integration into the American milieu. They have been a major channel for cooperation with the non-Jewish community and for the development of mutual understanding and respect through common participation. They have helped to develop a sense of belonging and contributing to the general welfare which

no other vehicle could possibly have achieved.

Sometimes the Jewish stake in the American civic scene is dismissed with casual or even contemptuous reference to public relations. This attitude indicates a regrettable misconception about the profound significance of an aspect of American life which the Jewish community has incorporated and made its own. It is in this country that the concept and practice of voluntary services has reached its highest peak, and has become an intrinsic feature of American culture. It is this drive to give service in the American sense which merged with historic Jewish traditions and institutions of service to help create the agencies and communities we have today.

It is essentially from the point of public relations that we must regard the role of hospitals within the framework of Jewish communal support. They and our vocational agencies are the major ways in which we serve clients on a non-sectarian basis, and are the primary expression of the Jewish communal desire to contribute to the general welfare.³

At the present time, Jewish communities are gravely concerned about the aspects of the urban crisis. There is genuine desire to be helpful, and hospitals and vocational agencies have been particularly effective in dealing with these problems. Thus, the public relations factor at this time is a particularly powerful and relevant one.

Nevertheless, it is true that the importance of the factor of public relations has decreased as public responsibility has

developed, and as sectarian sponsorship has been increasingly challenged. This is particularly true in the case of hospitals, which present a special planning problem to Federations.

The Negative Criteria

From both a long and short term viewpoint, there are a number of criteria which are negative in that they indicate reasons for declining Jewish support. These are:

- 1) Decreasing relevance to the Jewish community, as indicated by non-Jewish clientele and non-Jewish board members.
- 2) Increasing public responsibility and support, to the point of minor support from the Jewish community.
- 3) Decreasing relationship with, and dependence upon, other Jewish agencies and Federation planning. Related to this will be increasing involvement in non-sectarian planning structure, such as regional planning in the health field.
- 4) Increasing responsibility for a field of service by non-sectarian services, making a transfer to non-sectarian sponsorship a valid step.

The presence of only one of these factors will rarely be a sufficient reason for declining Jewish support. Thus, a children's agency may receive a large percentage of financial support from public sources, but may retain thoroughly traditional features. A Jewish hospital may receive a tiny percentage of its budget from Federation, but may continue to be a major vehicle of community relations and of tremendous help to other Jewish institutions, such as homes for the aged. On the other hand, where two or more of the four factors are present, there may be serious questions of continuing Jewish support.

³The Jewish community does, of course, make many additional contributions to the general welfare through its national and local community relations programs, special projects relating to the urban crisis, the provision of agency know-how in many programs and experiments. This discussion refers primarily to traditional Jewish health and welfare programs.

In Conclusion

The practice of community organization, of which community planning is a major part, is an art in the field of human relationships. A wise man once said, "We have no problems—only people."

The Jewish community is a highly complex mechanism requiring tremendous understanding, skill, sensitivity and wisdom to keep it in the state of stability and effectiveness for which it is justly famous. There are no instant solutions to such difficult problems as priorities, degree of support, creation of new services or elimination of old ones. There continues to be preoccupation with day-to-day immediate pressures and problems. Impatience with theory and principles persists among Federation lay and professional leaders. To some it will seem that for a sophisticated Federation planner to develop perspectives and guidelines is to step where angels fear to tread.

In the face of the fundamental problem of the weakening sense of Jewish identity, with its frightening implications for the very survival of the organized Jewish community, we can no longer be complacent about structures, processes and thinking which have served us well in the past. It is no longer a compliment and matter of pride for a lay or professional leader to be concerned only with the "practical." In the current period of crisis, change and challenge, such an attitude is too often a rationalization for an inability to understand and deal effectively with the unusual complexities which characterize many current problems.

Planning guidelines rooted in the basic objective of community survival will not, in themselves, give us solutions to all of our specific problems. Hopefully, they will provide some principles which will at least relate our thinking and decision-making to some significant framework of Jewish meaning and purpose.