Community-Wide Planning for Faith-Based Service Provision: Conceptual, Policy and Practical Challenges

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Abstract

The context for this paper is the public policy interest in the US and the UK in the contribution that faith based organisations can make to the provision of welfare and other public services, and the corresponding demands on such organisations to consider how they plan and deliver services. We present findings from a major research program, comprising ten studies conducted over five years, which aimed to facilitate the planning of service provision within one faith group, the UK Jewish community. We examine the opportunities and obstacles facing this 'Jewish voluntary sector' and we discuss the lessons from the research process itself about the benefits and challenges of taking a community-wide approach to the planning of services within and across a faith group. We conclude by reflecting on the appropriateness of a collective conceptualisation of 'faith based organisations' in the current public policy environment.

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<u>Introduction: Faith-Based Service Provision: The Policy Pressures and the Research</u>

In both the US and the UK, policy makers and politicians have shown increasing interest recently in 'faith-based organisations' or 'f.b.o.s' – religious congregations as well as those voluntary and nonprofit organisations which are to some extent grounded in a faith tradition. The contribution that f.b.os can and might make to providing welfare and other public services has been of particular interest. Reflecting this public policy trend, there is now a growing body of research-based literature which examines aspects of service provision by faith-based organisations.

Some of the research is anchored in the public administration, public policy and social policy traditions. It focuses on the contribution which faith-based organisations can and do make to public policy formulation and implementation, with or without dedicated governmental funding. Cnaan (1999) and Wineburg (2001), for example, provide over-views of the issues arising from the involvement of religious organisations in public policy. Smith and Sosin (2001) examine the extent to which 'faith-related' social service agencies have characteristics and resources of a kind which enable them in practice to promote the Bush Administration's social policy goals, Cnaan (2002) and Saxon-Harrold et al (2000) provide comprehensive data on the capacity of religious congregations in North America to contribute to social welfare services provision. A growing number of researchers in both the US and the UK are providing qualitative and quantitative data about the implications of changing public policy goals for faith based organisations themselves, including not only congregations, but also smaller and local

level organisations (Cameron, 1998; Campbell, 2002; Chaves and Tsitsos, 2001; Harris et al, 2003; Lukka et al, 2003). Many use their research as a base for debating the ability of f.b.o.s to expand their social welfare and public services roles.

Another body of literature focuses on aspects of managing faith based organisations which provide public services. Thus Gibelman and Gelman (2002) look at the 'managerial track record' of f.b.o.s. involved in the delivery of social services and warn that their leaders are subject to the same 'human frailties' as others and Nitterhouse (1997) looks specifically at financial management in small religious nonprofits. Stone and Wood (1997) explore the impact on the boards of religiously-affiliated social services providers of expanding their governmentally funded provision. Some authors have explored, empirically and theoretically, the extent to which management of f.b.o.s can be seen as distinct from the management of other kinds of nonprofits (Brinkerhoff, 1999; Harris, 1998; Jeavons, 1994).

Most of these studies of faith-based service provision have in common a focus on *individua*l organisations. The relationship between an individual f,b.o. and its religious denominational structure is occasionally mentioned, especially in studies of congregations (Ammerman, 1997; Chaves and Tsitsos (2001; Harris, 1998). And there have been some studies of those 'umbrella' or 'intermediary' organisations which bring together organisations across faith boundaries or which bring together organisations of a particular faith into a confederation (Baum, 1994; Koch and Johnson, 1997). But even in these studies, the focus is essentially on *individual* organisations.

This individualised conceptualisation of f.b.o.s has proved to be informative but it is no longer sufficient for scholarly or policy purposes. First, it does not reflect the fact that

f.b.o.s often function in practice as part of broader cultures, communities, movements and networks into which they are organisationally embedded (Milofsky, 1999; Schneider, 1999). As with the neighbourhood organisations studied by Chaskin (2003), we need to look at f.b.o.s within their 'broader ecology'.   Second a focus on individual f.b.o.s does not fully reflect the new policy pressures. For if f.b.o.s are to expand their capacity to deliver public services, to use their available resources more effectively, or to make their voices heard in public policy arenas, they, like other nonprofit and voluntary organisations, will have to consider maximising their available resources by collaborating with other organisations (Mulroy & Shay, 1998; Stone, 2000). The need to consider collaborations across congregations and nonprofits of the same faith grouping becomes particularly apparent.

This Paper

This paper takes a step towards responding to the new policy and conceptual challenges by providing a description and analysis of a recent research initiative which had two distinguishing characteristics. First, it was conceived explicitly as a response to the changing policy environment for faith based organisations; the rising governmental interest in their service-providing role and the changing nature of governmental funding for such services. Second, the research initiative took a community-wide perspective; that is, it was grounded in a collective conceptualisation of f.b.o.s. The initiative was taken with respect to, and within, a single faith group, namely UK Jews (1).

We present findings from this major research project which was intended to facilitate the planning of service provision by Jewish organisations for the next 15-20 years. The project (officially entitled 'Long Term Planning for the British Jewish Community' or

'LTP') broke new ground in moving beyond questions of planning by individual Jewish service-providing organisations; it aimed to encompass planning for all the organisations of the British Jewish community; that is, for the 'Jewish Voluntary Sector' (2).

In the following sections of the paper, we first explain briefly the background to the establishment of the LTP and then present some of its key findings about the opportunities and challenges facing the UK Jewish Voluntary Sector (JVS) in the future. We discuss the lessons learned from the LTP research process about the benefits and challenges of taking a community-wide approach to the planning of services within and across a faith group. We conclude by reflecting on the appropriateness of collective conceptualisations of f.b.o.s in the current public policy environment.

The Long Term Planning Project and the Research Approach

With funding and encouragement from Jewish philanthropists, infrastructure organisations, and major service providing agencies, the LTP was established in 1997 as a five year project by the Institute for Jewish Policy Research (JPR) (3). The initiative reflected an ongoing concern amongst the funders, providers and users of Jewish service-providing agencies - expressed in public seminars and the Jewish press – about apparent imbalances in the distribution of Jewish communal resources and about the need to think strategically about the future of the UK Jewish community. The overall aim of the Long Term Planning Project was to chronicle the current state of the Jewish voluntary sector in the United Kingdom, so that strategic planning decisions could, in the future, be guided by accurate information. The intended outcomes of the LTP, as stated initially by the JPR (Harris and Hutchison, 2003) were:

- To identify and build on the Jewish community's distinctive strengths;

- To help the Jewish voluntary sector develop a shared vision and sense of its own identity; and

- To develop a strong and cohesive sector as a prerequisite for planning for the future.

During the period 1997 to 2003 ten research projects were commissioned and published by JPR. Some were intended to provide insights into a key issue currently affecting the Jewish community in the UK (for example care of the elderly or provision of Jewish day schools); some focused on matters of general concern to the Jewish voluntary sector (for example, funding or governance); and some were intended to provide demographic and sociological data on the Jewish community and/or the users of Jewish welfare and educational agencies. In selecting the research topics, JPR took into account the known gaps in knowledge about the UK Jewish community as well as the expressed concerns of the infrastructure bodies and the major service providing agencies within the community. (Titles of the ten LTP constituent reports are given in the Appendix.)

Following the completion of the data gathering phase of the project, the results of the ten constituent reports were drawn together in an Interim Report. Volume One (Valins, 2003) provided a compendium of (mostly) quantitative descriptive data about the characteristics of the Jewish population of the UK, the demand for services to meet needs, and the resources available to do so. Volume Two (Harris and Hutchison, 2003) focused on broader issues and trends relevant to the UK Jewish community and drew out the key themes and issues which emerged from the ten constituent reports taken as a whole.

The two volumes of the Interim Report were considered in detail by a panel of independent people selected by JPR because of their relevant knowledge of social policy, the Jewish community or the British voluntary sector. JPR staff then drafted a final report of the LTP project which took into account the comments and suggestions of the Advisory Panel (Institute for Jewish Policy Research, 2003). The final report differed from all earlier reports prepared as part of the LTP in that it not only presented data on characteristics of the Jewish community and the issues facing it but also provided research-based recommendations for strategic planning of the whole Jewish voluntary sector in the future (4).

In the next two parts of this paper we present an account of the key opportunities and challenges found to be facing the UK Jewish voluntary sector or 'JVS' ; opportunities and challenges which might be taken into account in planning for the future of both individual agencies and the JVS as a whole. Our presentation derives primarily from the authors' own synthesis and analysis of the data and findings contained in the ten constituent research reports of the LTP; a synthesis done initially at the request of JPR who were seeking an independent perspective on the findings of the LTP constituent reports (Harris and Hutchison, 2003). Our approach was to treat each of the ten reports as raw data and to apply qualitative data analysis techniques in order to draw out common key themes. In addition we conducted a background analysis of key relevant trends in British society generally (a 'PEST' analysis) and in the British voluntary sector in particular.

In analyzing the findings of the ten constituent reports on the Jewish voluntary sector, our selection of topics and the relative importance we attached to each was informed by our findings in these background analyses. For example, with respect to the general

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British context for the Jewish voluntary sector, we noted the implications of diversity and pluralism and of perceived decline in civic engagement and associational behaviour – as well as governmental attempts to address these issues through funding programmes and new initiatives. We noted also the continuing public policy moves in the UK to shift responsibility for delivery of public services to the commercial and voluntary sectors – such that faith and minority ethnic organisations will face rising expectations from both potential users and governmental agencies that they will meet a range of care and communal needs. More specifically, we noted the increased pressure on UK voluntary agencies to demonstrate accountability, quality and impact of services and to adapt rapidly to a changing funding environment that requires organisations both to collaborate and to compete with each other.

<u>Opportunities for the UK Jewish Voluntary Sector – Findings from the LTP Research Reports</u>

Volunteering:

The LTP reports suggest some opportunities for the JVS in relation to volunteering. The research showed that existing volunteers display a strong commitment to the Jewish community as a whole, and to the particular cause(s) with which they are involved. This motivated them to become involved in the first place and then to remain involved and also to draw in family and friends. The reports also showed that Jews, like members of other UK faith communities (Lukka et al, 2003), want to stay 'in touch' with each other, and with their religious, ethnic and cultural roots. This is wish is reflected in a growing interest in cultural activities, in informal adult education and in leisure time activities such as reading Jewish newspapers. Identifying as Jewish occurs in a number of different

ways and is not confined to attending religious events or being involved in welfare service provision.

Earlier research on volunteering amongst the general population in the UK indicated that the main route through which people become volunteers is through friends and family and that the main reason why people do *not* volunteer is because they are not asked (Davis Smith, 1998). Taken together with the LTP study findings, this suggests, then, that the Jewish voluntary sector has scope to capitalise on the strong sense of Jewish identity to secure a higher level and rate of volunteering.

Funding:

Both the wider voluntary sector funding climate in the UK and the current funding situation for Jewish voluntary organisations appear to offer positive opportunities for the JVS. Halfpenny and Reid's study for the LTP (2000), calculated the income of the Jewish voluntary sector to be just over £500 million in 1997 (from all sources), against expenditure of nearly £400 million. They also estimated that income, expenditure and funds of the Jewish voluntary sector were each about 3% of the income, expenditure and funds of the whole UK voluntary sector; about six times more than might be expected given the size of the UK Jewish community compared with the population as a whole.

The number and range of funding bodies for the JVS is also noteworthy, with organisations which include finance or resourcing functions (such as grant-making or fundraising) making up 48% of the Jewish voluntary sector (Halfpenny and Reid, 2000). Around half the Jewish voluntary sector's income from known sources comes from

individuals (donors and purchasers of services). British Jews are very likely to make charitable donations, both to UK Jewish and generalist organisations and to Israeli causes, but are most likely to give to Jewish causes in the UK (Becher et al., 2002).

Given this background of relatively high individual generosity and a high number of Jewish funding bodies as well as the relatively low dependence of Jewish voluntary and nonprofit organisations on governmental sources of funds (compared with the wider voluntary sector), Jewish organisations are relatively well placed to set their own agendas and priorities independently of government. At the same time, governmental funding programmes (including European Union sources) are likely to continue to offer interesting opportunities for Jewish organisations wishing to take an increased role in provision of services such as education, long-term care or social welfare generally. There might also be some scope for increasing fundraising and charging for services within what is a generally well-off section of the British population in terms of income and other resources..

Services Provision:

The LTP constituent reports also suggest a range of opportunities for the JVS in relation to service provision. Like other parts of the UK voluntary sector, the JVS could benefit substantially, should it so chose, from the UK government's drive to encourage the voluntary and nonprofit sector to take on a more substantial role in the provision of public services and area-based special programmes - with governmental funding available to support this.

The JVS could also benefit from a complementarity between the needs of the Jewish community and trends in UK government policies with respect to faith-based communities and minority ethnic groups. There are clear trends in public policy to respond sensitively to the growing diversity of British society by not only encouraging 'social cohesion' but also by providing services tailor-made for specific minority groupings. Thus, for example, the inclusion of Jews in the Race Relations (Amendment) Act 2000 requires local governmental authorities to provide culturally appropriate care for those in need and this, in turn, could create further opportunities for Jewish voluntary agencies to contract with governmental agencies to provide such services – for older people and those with mental health problems for example. The fact that a large proportion of UK Jews live in physical proximity to other Jews reinforces this advantage. Geographical concentration of need and demand for welfare services allows economies of scale to be achieved in service delivery.

The UK Government's interest in, and support for, the further development of faith-based schools (Gardner et al, 2003) suggests that there could be scope for expanding Jewish educational provision. This opportunity, however, needs to be considered in the context of LTP findings which indicate that the demand for Jewish schools amongst Jewish parents may now have reached a plateau because of declining population levels combined with a changing market for child education (Valins et al, 2001).

On the other hand, the age structure of the Jewish population (about a quarter being aged over 65) and its relative longevity suggests that the demand for support services for the older population will continue to grow. Low birth rates amongst all but the ultra-orthodox sections of the UK Jewish population, combined with rising female employment rates amongst Jews, further suggest that fewer family members will be available to

provide care for their older relatives, possibly prompting further increased demand for organised services. The fact that people are living longer with moderate levels of illness or disability suggests that there may be a growing demand for domiciliary and other community-based services.

Further opportunities arise in relation to the use of ICTs (Information and Communication Technologies) in service provision. The LTP constituent reports indicated a high level of awareness and use of ICT media amongst the British Jewish population. In London and the South East of England (Becher et al, 2002) 84% of the Jews surveyed had access to a computer; and in Leeds, amongst a generally older population, 57% had such access, with around 65% using a cell phone (Waterman, 2003). This opens up a range of possibilities in terms of service provision, including: the possibility of providing by other means services that do not absolutely require face to face contact; provision of Jewish education via the Internet for those not attending Jewish day schools; and responding more flexibly to the needs of young people. ICTs could also enable Jewish nonprofits to provide 'virtual accessibility' to their services (Kenyon et al, 2003); to meet the challenges of providing services for those currently excluded from mainstream Jewish services because of their geographical location away from the main population concentrations of Jews.

Challenges for the UK Jewish Voluntary Sector – The Findings from the LTP Research Reports

Despite these many opportunities available to the JVS – especially with respect to volunteering, funding and service provision – formidable challenges for the future emerge from the LTP studies when they are looked at together.

Human Resources:

Although, as noted earlier, there is evidence of a high commitment to the Jewish community amongst current volunteers and a general inclination of Jews to associate with other Jews, the nature of the current volunteer workforce of the JVS poses a number of challenges. The LTP reports indicate that Jewish volunteer-involving organisations have found it increasingly difficult to find new volunteers. Recruiting suitably qualified Jewish staff is also proving problematic, especially in the fields of education and long-term care.

The age profile of the community suggests that problems may lie ahead in maintaining and developing a sufficiently large group of volunteers able to take on governance, fundraising and service provision roles. The LTP governance study by Harris and Rochester (2001) noted that recruitment of board members has been largely self-perpetuating, and that recruiting younger board members has been difficult. Moreover, the weight of responsibility felt by boards as a result of changes in public policy was a de-motivating factor. The 'Jewish dimension' is undoubtedly an attraction for potential volunteers; the challenge for the future is to capitalise on this and other positive aspects of trusteeship and volunteering to ensure the sustainability of the JVS. There may also be a particular challenge for organisations providing welfare services to attract people (and especially younger members of the Jewish community) who may at present prefer to devote their available time and energy to Jewish arts, cultural and educational activities.

A rather different challenge presents itself in relation to paid staff. Several of the constituent reports note problems with staff recruitment. Schools in London and the South East of England have found it difficult to recruit Jewish studies and Hebrew teachers in particular (Valins et al., 2001). For strictly Orthodox schools there are even more complex challenges as gender segregation and the desire to cater separately for different 'sects' dissipates resources and leads to infrastructure problems of finance, staffing and sustainability. In some areas government inspectors have raised concerns about the quality of teaching of secular subjects in strictly Orthodox schools (Valins et al., 2001).

Creating the 'Jewish ethos' valued by so many users of Jewish voluntary sector provision is a challenge not only for schools but for providers of long-term care and other services such as day centres and sheltered housing. Valins (2002) notes that only 4% of staff working in Jewish voluntary sector care homes in the UK are themselves Jewish. This, coupled with the general staff recruitment and retention problems of the care sector, poses serious challenges to the continuing provision of high quality services with a Jewish ethos.

Funding:

Although, as indicated above, the funding environment of the Jewish voluntary sector currently looks relatively healthy, the future is less secure and, indeed, many organisations are already experiencing serious problems with declining levels of reserves in the context of a gloomy external economic climate.

The fact that the sector receives a large proportion of its funding from individual donors is, in the short-term at least, a positive feature because it reflects lower dependence on governmental and corporate funding. However, the constituent LTP reports raise questions as to whether the level of individual donations can be maintained as older generations of Jews die. The following generations will not necessarily retain the same level of commitment to exclusively Jewish philanthropic activity. And it seems likely that legacies will decrease in numbers and amounts as older people are required to spend savings on their own care in later life. Another challenge is presented by the finding that although grant-making trusts (foundations) make up a substantial proportion of the totality of the Jewish voluntary sector, they do not necessarily direct their funding to areas of greatest need, to 'mainstream' Jewish groupings, or even to exclusively UK or Jewish organisations.

There will also be challenges in relation to the receipt of governmental funding. Although, as indicated earlier, governmental funding opportunities are likely to increase for those organisations able to respond to the specific needs of faith and minority ethnic communities, Jewish organisations which choose to benefit from these opportunities will face the challenge of retaining their independence; their freedom to appoint their own board members, to decide for themselves which needs are most pressing and to determine how those needs can best be met. There is now clear evidence from the British voluntary sector that government funding and involvement in the provision of public services can rapidly erode the autonomy of 'partner' voluntary organisations (Balloch and Taylor, 2002; Lewis, 1999).

Services Provision:

A number of challenges present themselves in relation to the service-providing role of the Jewish voluntary sector; some specific to particular fields of work and others more general.

As regards provision of Jewish education, the problem of recruiting suitable day school staff has already been mentioned. The LTP reports indicate further challenges in this area including meeting Jewish parents' high aspirations, especially in relation to academic standards and quality of teaching; parents who may 'shop around' for schools and are not necessarily committed to Jewish schooling if it cannot meet their needs. More broadly, there are challenges of meeting the education needs of children who have special needs and/or who live outside the main geographical areas of Jewish population. Also, the data suggest, there will be an ongoing external challenge of demonstrating the effectiveness and legitimacy of specifically *Jewish* schools within the spectrum of faith-based schools and the wider UK educational sector.

It seems that those responsible for planning the long-term care of older Jewish people are also faced with a number of uncertainties and dilemmas, not least the difficulties of ascertaining people's future care preferences and the expectations of future generations for their personal care in later life. Issues of sustainability of long-term care provision loom large as the UK Jewish population reduces in size. The problem of ascertaining likely future demand patterns is complicated further by the difficulties posed by other demographic changes such as increasing numbers of marriages of Jews to non-Jews and the rise in rates of divorce and single parenthood amongst the Jewish population.

When these dilemmas are combined with the evidence from LTP reports of growing consumer sophistication and demand for 'choice', the challenges for service provision in the future are compounded. It seems that a radical re-think of the way in which long-term care is provided for older Jews may now be needed. A proposed EU directive which would require ethnically based organisations (1) in the UK to provide services to other ethnic groups as well as their own, raises the possibility that Jewish organisations could be sustained in the future by opening up their services to non-Jews (as is already done in North American Jewish nonprofits as well as in some Jewish schools in the UK.)   On the other hand, this kind of solution could exacerbate the problems referred to above of retaining a Jewish ethos in service-providing organisations with few Jewish staff.

Whilst provision of education and long-term care poses especial challenges to planners, the issues that arise also reflect strategic challenges affecting service provision *across* the whole Jewish voluntary sector. One of the most significant of these is the implication of population dispersal: how best to provide services to Jewish people living outside the main concentrations of Jews in the South-East and North-West of England. The 2001 British Census was the first to ask about religious affiliation and it revealed the existence of Jewish communities (albeit often small) in every county and regional area of Great Britain. The concurrent migration trends of Jews *towards* existing geographical concentrations of population *as well as* to areas remote from existing areas of Jewish population raises further questions about the extent to which family members will be able to provide informal care for each other in times of crisis and when longer term care is needed. The less informal care is available, the higher will be demands and expectations on the formal Jewish service providers.

Strategic challenges to service providers are also posed by a sociologically distinctive feature of UK Jewry. In the UK population as a whole there is a high incidence of 'believing without belonging' (Davie, 1994); that is, a low level of attachment to organised religion even though a high proportion of the population claims to believe in a supernatural being. The Jewish community differs from this in that its pattern can loosely be termed 'belonging without believing'; that is, a substantial proportion of those who identify as Jews join synagogues but many of them do not regard themselves as 'religious' in outlook. What kinds of organisations and services, then, are appropriate for these Jews who identify culturally and/or ethnically with other Jews but who are at best indifferent to religious values and possibly antagonistic to them? The LTP constituent reports show that current service provision is heavily dominated by Jewish *religious* norms. This practice is now challenged by findings about the secular outlook of many Jews as well as by findings about changing demographics such as rising numbers of non-Jewish partners of Jews, rising numbers of children of 'mixed' partnerships, and rising proportions of self-identifying Jews who are not affiliated to synagogues or any other formal Jewish organisations. The difficulty of planning to provide for the needs of those Jews who are secular in outlook and/or outside the mainstream religious organisations is compounded by the difficulty of estimating future need, not just for long-term care but for other services too.

All of these findings, especially when they are considered within the context of general trends in British social policy, suggest that new thinking is urgently needed about the methods through which British Jewry delivers services to itself. Traditionally there has been heavy investment in buildings and staff as a response to found need but the findings from the LTP studies suggest that other ways of meeting social and welfare needs for the Jewish community could now be considered; for example, community

based services and 'intermediate level' services such as respite care, sheltered accommodation and supplementary education. The challenge, then, for Jewish communal planners is to begin to think innovatively about service provision; to try new ways of meeting old needs.

Sector-Wide Challenges:

The LTP constituent reports indicate how fragmented is the British Jewish voluntary sector. Separate, often quite small, organisations are run in the North and South of the UK, within the same conurbations and within the same fields of work. At the same time, the studies also suggest problems of human resource recruitment, uncertainty about future funding from individual donors and difficulties of gauging the extent and nature of future consumer demands and needs. Taken together, these findings indicate a further substantial challenge for the Jewish voluntary sector: finding ways to achieve greater co-operation, information sharing, resource-pooling and collaboration between individual voluntary organisations. Mergers have become fashionable recently in both the Jewish and general voluntary sectors but they are not necessarily the best, or most appropriate, response to problems of fragmentation or funding (Harris et al, 2002). The challenge for the Jewish voluntary sector is to consider a range of organisational responses which are suited to the field of activity, the geographical area and the extent of need and demand within the Jewish community. Such possibilities, as suggested by the LTP studies, include collaborations between Jewish and non-Jewish voluntary organisations engaged in similar areas of activity; collaborations between voluntary and for-profit organisations and voluntary and governmental organisations meeting similar needs; and establishment of Jewish 'network' or 'infrastructure' organisations to share information, achieve economies in bulk purchasing and/or lobby governmental agencies.

A further challenge for the JVS as a whole is how to retain independence of decision-making and priority-setting (in whole or in part) in the face of government pressure to take an expanded role in provision of public services. Such expansion might well come at the expense of an ability to identify new needs, to meet needs in particular ways, to provide services exclusively for Jewish consumers and/or to provide services according to traditional Jewish practices.

A third challenge emerged from the very process of conducting the LTP studies: the incomplete knowledge base about the Jewish community and its future needs and wishes. In the past there has been a disinclination to invest resources in collecting, monitoring and updating information about the Jewish community and analysing it on an ongoing basis. In addition to basic statistical and attitudinal data, there is an ongoing need amongst policy makers and planners for evidence about 'what works' as a means of responding to the needs and wishes of contemporary Jewry. Such data could build over time into a knowledge base for future planners and decision-makers - but it is, of course, a largely invisible investment and one which is easy to cut back on when there are so many competing urgent demands.

Finally, the LTP studies point to a need to consider the organisational and social infrastructure of the UK Jewish community. This means paying attention to nurturing and sustaining associational ties amongst Jews. These are ultimately the social capital which sustain and nourish the JVS and they drive the will to volunteer and give charitable donations and the desire to use the services provided. The challenge here is to build on the inclination of Jews to associate with each other and to minimise the impacts of factionalism within the community. At the same time ways will need to be

found of engaging the interest of 'unaffiliated' Jews, those outside the main centres of Jewish population and those at the most secular end of the religious spectrum.

Community-Wide Services Planning for Faith Groups: Benefits and Challenges

Benefits for the UK Jewish Voluntary Sector:

The LTP generated a plethora of research data which, in turn, allowed an informed assessment to be made of the opportunities and challenges facing the UK Jewish Voluntary Sector; a prerequisite of strategic planning (Bryson, 1995; Mintzberg, 1994). The constituent and final LTP reports will enable the leaders and managers of the JVS to move beyond anecdotal evidence, the interests of individual organisations, and the preferences of philanthropists, to develop 'evidence based policy' (Nutley and Webb, 2000) not only for individual organisations but also for the JVS as a whole. The foundation for planned change has been established. Indeed, the very publication of such comprehensive data is itself a driver for change.

In relation to JPR's own stated intended outcomes for the research programme (see above), the LTP was a success. The constituent research reports identified the many strengths and valued qualities of the UK Jewish voluntary sector, thus providing a motivating factor for the future for staff and volunteers of the sector. In providing, for the first time, a set of research-based recommendations for the sector as a whole, the LTP Final Report (Institute for Jewish Policy Research, 2003) gives the Jewish community as a whole a firm foundation for debating its future deployment of resources and allocation of priorities.

In fact, quite apart from its final outcomes, the LTP can be seen as worthwhile because of what was accomplished during the LTP process itself. The various research studies offered paid staff and volunteers of the JVS a regular stream of data relevant to their working lives over a five year period and enabled them to see their own work within the broader context of the whole Jewish Voluntary Sector It also enabled them to make links between the issues facing the JVS and those facing the broader UK voluntary sector. And the LTP leaves a legacy of published research data which can provide bench marks for future data gathering and research projects.

Broader lessons about community-wide planning for faith-based service provision:

The LTP provides a number of lessons for other faith groups contemplating a community-wide approach to planning services provision. First, we would note the challenge of collecting sufficient relevant data to facilitate planning for a whole faith community. The key sources of such data are the myriad of (generally small) organisations which together make up a sector or sub-sector. Reaching a high proportion of these and obtaining cooperation such that valid data is obtained, can be a political and technical challenge in its own right.

Beyond this, there is the challenge posed by the range of data that ideally is needed as a base for planning. The LTP was concerned with a faith community which is estimated to encompass little more than 300,000 people and it included ten major research projects conducted over five years. It focused on what were hypothesised at the outset to be key topics. All the same, it had neither the funding nor the time to collect data about some key aspects of the UK Jewish community. For example, only limited data

were obtained on volunteers and paid staff; and no information was obtained on adult learners or those with special educational needs.

It was fortunate that, in the case of the UK Jewish community, there was some pre-existing earlier research which could be drawn upon for LTP purposes to mitigate the impact of the knowledge gaps. There is also some expectation that the success of the LTP will encourage further investment in planning-relevant research in the future. Other faith communities may not be so fortunate. Certainly the problem of finding funding to develop the evidence base needed for community-wide policy making and planning is set to endure because the philanthropists of faith communities generally favour funding tangible services rather than research infrastructure.

Conceptual and Theoretical Challenges of Community-Wide Planning for Faith Groups:

The LTP experience suggest that, in addition to the very practical challenges faced by those who wish to attempt community-wide planning for faith-based service provision, there are challenges which are rather more conceptual and theoretical.

One such challenge relates to the very concept of 'service planning' and its application to specifically faith-based organisations and groupings. That is, what is the rationale for planning in a faith community to be 'research-based' or 'evidence based' in the way that the LTP was? The idea of research-based or evidence-based policy derives from secular social and planning sciences. How far, then, is it applicable to faith groupings which have long-standing traditional practices and norms (Salipante and Golden-Biddle, 1995), special views of charity and philanthropy (Stauber, 2001), wise elders and religious tenets? Any or all of these might suggest priorities for services and resource

allocation which differ from those emerging from a research-based exercise. In short, the argument in favour of research-based planning cannot be taken for granted in a faith context and this point has implications for gaining access to research sites as well as for developing appropriate recommendations.

A second challenge raised by the LTP experience, is how to move from the collection of data to planning, action and change . This conundrum has long been the subject of debate amongst practice-oriented academics and no solution has yet been found (Barrett and Fudge, 1981; Deacon and Mann, 1999; Hart and Bond, 1995). For research data does not lead inevitably to solutions or recommendations. Research in and about nonprofit organisations can provide information and perspectives and it can show 'where the shoe is pinching'; that is, it can point to problems and issues that seem to require attention by policy makers and planners. But the move from there to recommendations for planning and action requires the application of values and principles (Bryson, 1995; Fischer, 2003). A range of possible responses have to be generated; demands of a range of stakeholders have to be attended to; and choices have to be made between competing priorities and needs. When the objective is community-wide planning rather than planning for individual service providers, the problem of moving from data to action is compounded.

Faith communities contain within them a range of theological and ideological perspectives on how best to meet human needs (Jeavons, 1994; Loewenberg, 1995). They also have a range of 'stakeholders'; individuals and groups who can place a claim on them. Are these multiple perspectives and stakeholders to be acknowledged, as nonprofit strategic planning literature suggests they should be (eg Bigelow et al, 1996; Bryson, 1995)? Are the differences and competing viewpoints and claims to be openly

debated or are some views to be censored? Is an attempt to be made to reach some common understanding or consensus? (Doing so is itself a principle of faith within some religious groupings and is also highly recommended in the nonprofit strategic planning literature.) Or are recommendations to be made and decisions reached by other means such as by spiritual leaders, secular leaders, major philanthropists, or infrastructure bodies? In short, whose values, views and needs are finally to prevail when not all stakeholders can be satisfied and when difficult resource decisions must be made?

Even assuming that some resolution is reached to this key problem about policy decision-making within and across faith communities, an equivalent range of questions arises in relation to enforcing the implementation of any decisions reached across the whole faith community.

As regards the LTP process, the JPR has struggled with the practical implications of these theoretical questions about research-based planning and its implementation in the Jewish community context. As a 'think tank' within the UK Jewish community it can command the support of a fairly wide range (theologically and ideologically speaking) of leaders and philanthropists. But it cannot enforce consensus or implementation. Instead, it has tried to build wide support for its recommendations on LTP:

a. By ensuring that all recommendations are clearly grounded in research findings;

b. By seeking advice on the research findings and their implications from independent experts from within and outside the Jewish community; and

c. By encouraging debate on the research findings and related recommendations through publications, meetings and seminars.

This approach combines evidence-based practice with sensitivity to multiple stakeholders - in line, again, with best practice in secular policy-making and planning. It remains to be seen whether the approach will prove to be acceptable and implementable within the context of the Jewish community in the UK.

A Collective Conceptualisation of Faith-Based Service Provision?

At the start of this paper we argued that it was time to move beyond an individualised conceptualisation of f.b.o.s. In the light of the current policy pressures on f.b.o.s to deliver public services, we argued that we also need to see them collectively, as embedded in networks and communities comprising, for example, other local nonprofits, other f.b.o.s and – especially - other organisations of their own faith grouping. We then presented the findings of an extensive research project which took a community-wide perspective on the UK Jewish community. As far as we are aware, the LTP was the first study of its kind and so we conclude this paper by reflecting briefly on what lessons it offers nonprofit scholars about the usefulness and appropriateness of a collective conceptualisation of faith based service providers.

First, the LTP experience suggests that a collective conceptualisation can open up practical benefits for f.b.o.s themselves. For individual f.b.o.s, there is the benefit of seeing their own organisational challenges within the context of a broader collectivity of organisations which not only share a similar organisational environment, but also have at least some similar features to themselves. Problems formerly thought to be unique to one organisation can be revealed as common across a faith community and perhaps, therefore, open to communal solutions. (In the case of the LTP this applied to the question of volunteer and paid staff recruitment for example.) And new opportunities can

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also be revealed; possibilities for inter-organisational collaborations for example, or new ways of thinking about fundraising and resource allocations.   These factors have the potential to make faith-based service providers, individually and collectively, better able to respond, if they so wish, to the current policy pressures.

At the same time as pointing to the practical benefits of a collective conceptualisation of f.b.o.s, we should also note that the LTP provides some lessons, and warnings for researchers. We found that the analytical work entailed in synthesising disparate data drawn from multiple sources – a task which is implied by any research focused on a 'faith community' rather than individual f.b.o.s – posed formidable intellectual and methodological challenges. We had, in effect, to 'invent' a collective conceptualisation of Jewish f.b.o.s through that very process of synthesising disparate data and through looking across it to envisage a 'Jewish community' or a 'Jewish voluntary sector' which was more than, and distinct from, the sum of its parts.   As has been pointed out by social theorists (eg Giddens, 1990; Beck, 1992) this is a common role for social researchers in contemporary society; they do not just reflect the social world, they also construct it as a 'knowable' object for intervention.   Yet engaging in this kind of 'reflexivity' is challenging and time-consuming.

In sum, it can be said that the LTP process and outcomes produced immediate practical benefits for the planners and providers of Jewish services in the UK. It also offered lessons for other faith communities. In addition, it enabled us to test out the feasibilty of using a collective conceptualisation of faith-based service providers; and to discern the challenges posed for researchers by such a conceptualisation.

Appendix

JPR Constituent Reports

Harris, M. (1997) *The Jewish voluntary sector in the United Kingdom: its role and its future*, Institute for Jewish Policy Research, London

Halfpenny, P. and M. Reid (2000) *The financial resources of the UK Jewish voluntary sector*, Institute for Jewish Policy Research, London

Schlesinger, E. (2000) *Grant-making trusts in the Jewish sector*, Institute for Jewish Policy Research, London

Harris, M. and C. Rochester (2001) *Governance in the Jewish voluntary sector*, Institute for Jewish Policy Research, London

Valins, O.; B. Kosmin and J. Goldberg (2001) *The future of Jewish schooling in the United Kingdom*, Institute for Jewish Policy Research, London

Becher, H.; S. Waterman, B. Kosmin and K. Thomson (2002) *A portrait of Jews in London and the South-east: a community study*, Institute for Jewish Policy Research, London

Valins, O. (2002) *Facing the future The provision of long-term care facilities for older Jewish people in the United Kingdom*, Institute for Jewish Policy Research, London

Valins, O. and B. Kosmin (2002) *The Jewish day school marketplace: The attitudes of Jewish parents in Greater London and the South East towards Formal Education*, Institute for Jewish Policy Research, London

Waterman, S. (2002) *The Leeds Jewish Community Survey*, Institute for Jewish Policy Research, London

Schlesinger, E. (2003) *Creating community and accumulating social capital: Jews associating with other Jews in Manchester*, Institute for Jewish Policy Research, London

(1) For the purposes of this paper, we take Jews to constitute one of the many 'faith communities' or 'faith groups' within the UK. The number of UK citizens who identify themselves as Jewish is currently estimated to be about 300,000. We acknowledge that our conceptualisation of Jews as a 'faith group' is itself open to debate because many who identify themselves as Jewish do not consider themselves to be 'religious' and because Jews can also be conceptualised, additionally or alternatively, as an ethnic grouping (Becher et al, 2002). However, we believe that the conceptualisation of Jews as a faith group is sufficiently widely accepted to make it appropriate for purposes, as here, of discussing public policy and related issues (see also Harris et al, 2003).

(2) It is common in the UK to understand the totality of the nonprofit or voluntary sector as containing within it a number of sub-sectors. Thus Butt (2002) discusses the UK's 'black and minority voluntary sector' and Smith (2003) refers to the 'faith sector' as a 'subset' of the UK voluntary sector.

(3) The Institute for Jewish Policy Research (or JPR) is an independent think-tank that informs and influences policy, opinion and decision-making on social, political and cultural issues affecting UK Jewish life. Its current programmes focus not only on planning of Jewish services (as in this paper) but also on Jewish culture, Israel and civil society matters. Further details are at www.jpr.org.uk .

(4) For the purposes of the LTP, 'the British Jewish community' and the 'British Jewish voluntary sector' or 'JVS' were conceptualized according to Harris (1997) as comprising a range of voluntary organisations including: social welfare agencies which provide care services; membership associations and clubs; self-help and mutual aid groups; synagogues and confederations of synagogues; fund-raising charities; grant-making trusts; educational institutions including schools and museums; housing associations; pressure groups and advocacy groups; a*d hoc* consultative or event-organising groups; and umbrella, intermediary and representative bodies. The prime focus of LTP was those organisations which provide *services* to British Jews although the various research reports also investigated factors concerning the future of Jewish membership organisations, fund-raising organisations, grant-making bodies and advocacy and representational groupings.

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