

C-7440 to C-7441 Transcriptions

Wexner Heritage Foundation. Boardroom discussion. 27 June 1996.

Herbert A. Friedman: Uh, D, any-any anything else on that rating thing? D.

Audience member: What happens when nobody knows about that person? And um, and you haven't been able to dig up any information.

Herbert A. Friedman: Okay, so you got-

Audience member: Just to ge-get the cold card to somebody and say, do as best, do as much as you can?

Herbert A. Friedman: What?

Audience member: Do you give that card to someone to ma- basically, cold call and say, just get as much as you can?

Herbert A. Friedman: No, no, no, you have to rate every card. Above whatever limit, depends on how many cards you have. If you've got - if you've got uh, I don't know, 500 cards above a thousand dollars, from a thousand up to a million, five hundred cards to rate is gonna take you a lot of time. And all I'm saying is that you've got to do it. Because the success of the whole campaign's gonna [1:00] depend on it. Otherwise it's gonna be haphazard, otherwise it's gonna be what you call 'cold

calls,' uh, anybody calling uh uh uh a three thousand dollar giver and trying to solicit him over the telephone, that's the next item. It's a no-no. you don't do it. You don't do it. And if you can't get the appointment, then you don't get the appointment. But you do not, do not, solicit gifts of any size over the telephone.

**Audience member:** Or by letter.

**Herbert A. Friedman:** What?

**Audience member:** I mean - I'm assuming, or writing to somebody's just as bad.

**Herbert A. Friedman:** Or writing to somebody. You just don't do it.

**Audience member:** Y'know, uh, most questions that I think's missing from your list here is and that is 'list-building' is part of the fundraising process.

**Herbert A. Friedman:** Yeah, but that's not the chairman. Look, hey, that's on eof those things that's gotta be done inside. I mean, that's Charlie's job, Charlie's gotta come up with those lists. If you got some names of people to suggest-

**Audience member:** If you just put the word out into your community, as a chairperson, saying bring the names to the federation so we have 'em, I mean, if you see somebody's-

**Herbert A. Friedman:** [interrupts] Yeah but that's, uh, c'mon, that's a waste of time. That's saying, bring all the name-bring any in hey, you know people-

**Audience member:** [interrupts] Okay, I see, 'cause you're looking for just, what, direct participation on our behalf.

**Herbert A. Friedman:** That's right. Direct, I'm talkin' about your direct action. Your direct action. If you - hey, your next door neighbor whom you know well and with whom you play golf and uh, and uh, you try to solicit him and you can't get anywhere with him, you give his name to Charlie and you give Charlie suggestions of four other people who might try to crack him, you've gone as far as you can go. That's a chairman's job. Uh, but the general accumulation of list-building, not your job. No way. [3:00] okay, how do you sit with this business of don't solicit by telephone? Can you live with it? How many of you do solicit by telephone? Ehhh..okay, about half.

**Audience member:** [unclear] many of us do it necessarily-

**Audience member:** [unclear] It's by level.

**Audience member:** It's a last resort-

**Audience member:** Super Sunday, that's when.

**Audience member:** You don't mean for any [unclear]

**Herbert A. Friedman**: Well, I said, significant gift. Now what's significant is determined by whatever the standards are in your community.

**Audience member**: But ask the same question, how many people significant - uh uh, solicit significant gifts, whatever that means in your community. How many people solicit significant gifts by telephone?

**Herbert A. Friedman**: That's another, that's the - I would broaden the question. How many people in your top leadership group, [4:00] whatever you wanna call it, your division, chairman, your women's chairman, your le-lawyer's chairman. However many people you consider to be in your top leadership group. Thirty people. Twenty people. Twenty-five, forty. How many of them solicit cards face-to-face in person and - I'm not talking about what, what, what the nature of their success, they get more or they have to take less or they get the same. I'm talking about taking the trouble and persistence and the patience to make the call to get the appointment to go make the solicitation and come back and report with a signed card. How many of your top leaderships persons in the campaign, the top thirty-forty people, do it [5:00] that way? Hands up.

**Audience member**: All of them do it for some of their cards.

**Audience member:** Right, that's what I was gonna say exactly.

**Herbert A. Friedman:** All of them do it for some of their cards. [laughs] And then they get tired and they peter out, and they-okay. So it depends, when you get to know that, it depends on how many cards you should give 'em.

**Audience member:** Well a guy who takes forty cards-

**Herbert A. Friedman:** [interrupts] Who?

**Audience member:** A guy who takes forty cards is different than a guy who takes three cards.

**Herbert A. Friedman:** Well obviously! The guy who takes three cards can't uh, cop out, he's not tired after three cards. Guy takes forty cards should only take twenty.

**Audience member:** Aha! Paul just a respite about half his cards.

**Paul:** Yeah I just got my cards cut down by half. But - I take forty to fifty cards, of which 95% are done face-to-face.

**Herbert A. Friedman:** Oh ho, oh ho ho ho. Well, okay, then you're a, you're a uh, you're a real good-

**Paul:** I'm a glutton for punishment.

**Herbert A. Friedman:** -you're a real good leader. [6:00] That's not normal. Normal is for a good leader with ten highly rated cards, let's say from uh, uh, twenty-five hundred or five

thousand bucks up uh, if he ,if he executes ten card uh, that's good. That's enough. Yeah?

**Audience member:** I found for myself, that I'm really feeling new to solicitation, this is really only the second year, but I'm now chairing a subdivision, a division, a women's division and it'll be my second year doing this. If it's a new, what I found has worked for me, and I- I have an infant and so -

**Herbert A. Friedman:** You have an infant.

**Audience member:** -this was not the year. I took on, uh, leadership of a committee-

**Herbert A. Friedman:** You shouldn't have.

**Audience member:** - [inaudible] I took on and and it was the damn proviso that I was not gonna be able to do face-to-face calls. I had a two month old at home, and so, but wha ti did do was those cards ,that I took that were - people that had not been solicited or had not been-not given tot eh campaign, I made a point of meeting with those people.

**Herbert A. Friedman:** Come on, you-y

**Audience member:** [continues] These are not huge, these are Genesis division, so we're not talking, we're talking five hundred to a thousand.

**Herbert A. Friedman**: Genesis division uh, what you oughta do is invite four ladies over for tea and uh, you can't do that the year that your, that your first baby is born. So uh, Charlie shoulda given you a year off and [audience laughs]

**Audience member**: Can-can we give ideas? Can we just throw out an idea?

**Herbert A. Friedman**: Sure.

**Audience member**: [continues] -that I did in Seattle which was successful for the first connections event that we did for women's division? I bought the table, I invited nine women to come who had never given to federation before, who wouldn't set foot to even go to a federation event, I invited 'em, I said, look, I'm - and I paid their gifts, okay? It was a hundred dollar minimum gift. I paid all of their gifts, and I said, I'm gonna pay it. Pre-pay it. And if you're moved, bring your checkbook.

**Herbert A. Friedman**: [laughs] That's a clever trick.

[audience commotion, **unclear**]

**Audience member**: Well the question is, was that a -

**Herbert A. Friedman**: Hugest figure, she was the hostess.

**Audience member**: No no no, I was-I can speak.

**Herbert A. Friedman**: Ohhh, you were at a table at a bigger meeting.

**Audience member**: Did it work?

**Audience member**: Um, y'know what, I think one gal maybe stepped up to align with Judah, and I think the others are dipping their toes in, it's cultivation. Which is very important also. These were women that had never been involved in the community, they're the unaffiliated ones.

**Herbert A. Friedman**: And you got them, and you got them to come to a large public function-

**Audience member**: [continues] Just on the strength of a social request to come.

**Herbert A. Friedman**: Whoo! Okay, good for you.

**Audience member**: When did you tell 'em to bring the checkbook? Before? Or - when there?

**Audience member**: I-I wrote them all a letter. I made it very clear, I don't like surprises.

[audience commotion]

**Herbert A. Friedman**: Okay, uh, let's let's-

**Audience member**: [**inaudible**] when you solicit women-to-women, and-

[commotion continues]



**Herbert A. Friedman:** [knocks on table] Yes?

**Audience member:** I have a question to ask. There are some known women in our community who do not make gifts without consulting their husbands first and I respect because their husbands are the breadwinners and we know that the husband really determines the gift. And so, is it okay to forewarn them that we'd like to - could she please discuss it with her husband, we'd like to meet with them, or could I phone him or [**inaudible**] and say?

**Herbert A. Friedman:** Phone him?

**Audience member:** [continues] Phone her. And just, ask her, I'd like to meet with you but give her enough time to speak to him first.

**Audience member:** I have an answer. Have her solicited by a widow.

**Audience member:** Or a divorcée.

**Audience member:** I can't tell you how many wealthy women there are out there who for years after their husbands suddenly left this world, were stunned, didn't know what the hell to do about it, anything, and [10:00] and actually, were doing themselves a disservice by letting their husband make all the decisions about all things and uh, and so on. Wouldn't be a bad idea to have a woman solicited by a widow. And when she-when she says, let me

talk with my husband, the widow can say to her, you know, there are some things we women have to decide by ourselves. And- and, it's, you know-

**Audience member:** You're taking the wind out of her sails.

**Herbert A. Friedman:** [unclear] good answer.

Audience member: What about another situation where you've got uh, a couple, they're both professional, they both work relatively equal kind of positions, and they always talk to each other? It's not like one's the breadwinner, one makes decisions, but it's a joint decisions. What do you do? Do you have - do you sit down and have a two-on-two, go after both of them, or do you go after one of them? [11:00]

**Herbert A. Friedman:** Well, no, it all depends on uh, where they are put in the campaign roster. I mean, if she is to be solicited in the women's division even though she's a quarter of a million dollar lawyer on her right and and if by some decision you put her in the women's division, which I think is incorrect but never mind, if that's the decision. Um, then she's gotta be solicited by uh, the most powerful woman who could possibly solicit her. Or, or! If she's put in the general uh, big gifts division, that small category up at the top which is where she really belongs, men and women all mixed up together, then it

doesn't matter if she's solicited by a man or if she's solicited by a woman, she's gotta be solicited by a good solicitor!

**Audience member:** No, but what I mean is, wha-what, how do you answer her when she says, my husband and I? Or if you solicit [12:00] him and he says, my wife and I always make a joint decision on this-

**Audience member:** [interrupts] I think you have to have meet with- [inaudible] AMERICAN JEWISH ARCHIVES [audience commotion, unclear]

**Audience member:** [inaudible] possibly be solicited together if they're both equal breadwinners in the family and make the decision as as, a [inaudible]

**Audience member:** You meet with both of 'em at the same time.

**Herbert A. Friedman:** Listen, if they like each other and they're willing to be solicited together and you have a good co-a good chemistry between the solicitor and this nice couple and between the two of them, what they gave last year, either separately or jointly, was 'x' and you're coming now and asking them for 'x' plus 'y,' then what do you care whether they talk together or they don't talk together or they should be solicited together or not?

**Audience member:** Should you just defer to them and say look, y'know, you're gonna be solicited. Do you wanna do this as a, as a unit or would you rather have-

**Herbert A. Friedman:** [interrupts] Why not, that's comfortable.

**Audience member:** [continues] -that's, y'know.

**Herbert A. Friedman:** You call one or the other of 'em and you say, hey, we gotta come over and talk to you about the campaign this year. Do you want us to come over in the evening when you're both home, or do you want us to visit [13:00] do-ju - let's make lunch and you come from your office and he comes from his office, we meet for lunch and we'll, we'll talk it over and you guys'll decide what you wanna give. Y'see if the chemistry's good and the mood is just natural and nobody is going with a sense of fear or enmity or or - then anything works.

Audience member: Yeah, but better to go, to talk to two of them together and close the deal right there, than risk talking to one of them and have them say no, I can't make up my mind regardless [**inaudible**]

**Herbert A. Friedman:** Sure.

**Audience member:** Hey, is what - this is a valuable resource.

**Herbert A. Friedman:** You know how many gifts are closed on a golf course? Lots! 'Cause that's easy and you got a long time,

you got two, three hours, walking over that beautiful green grass. And it's a good way to do it.

**Audience member:** I- I wanna take uh, liberty of getting y'know these great minds sitting around this table to help me crack a nut [14:00]. There's somebody that I know that should be at the leadership gift level. They are not-

**Audience member:** How much is leadership gift level?

**Audience member:** This is somebody that should be giving at least a hundred thousand dollars, if not more. I mean this is somebody that should be a big player nationally and internationally. I got him to the major gifts dinner this year, I got him to double his gift, but he was still very low - and at a fraction of the percentage of where he really should be.

**Audience member:** Maybe he doesn't understand?

**Audience member:** Help me. What am I gonna do with this guy? This is a guy that should be giving mega, mega bucks-

**Audience member:** [interrupts] What does he say?

**Audience member:** [continues] He's Jewish, he's got newfound wealth.

**Audience member:** What does he say when you say, Bob, we were looking for a gift of a hundred thousand dollars from you? What does he say?

**Audience member:** Wait a minute. This is someone that's brand new to this wealth but it's huge wealth.

**Audience member:** Find somebody that maybe is a contemporary of his.

**Audience member:** I was it, I was the contemporary.

**Audience member:** Could you explain to him? [15:00]

**Audience member:** Find somebody that's a contemporary of his or her, possibly in a like business, from out of your community and bring that person in to go with you and solicit.

**Audience member:** See, he's that kinda guy that should've been at the Wexner, with the fifty guys last summer. That Wexner brought in, the unaffiliated men.

**Audience member:** What?

**Audience member:** Last summer-

**Audience member:** Not Wexner Heritage Foundation, but Les Wexner brought in fifty guys who are unaffiliated all mega-bazillionaires, right. And y'know this is the kinda guy that should've been with [inaudible]

**Herbert A. Friedman:** He came there or he didn't come?

**Audience member:** No, he wasn't invited to that. I need some - [audience commotion, unclear]

**Audience member:** You might have a problem with him in the fact that, you made the point that he- he, he recently came into this enormous amount of wealth.

**Audience member:** [interrupts] -so ask him.

**Audience member:** [continues] -wait, wait, wait wait wait. So, I would think - it may not be the case, but I would think that he has a concern that now all of a sudden he has money, everybody all over the world is gonna be wanting to get their claws in it [16:00] and so I think that that needs to be respect. I think that I would say to him something like, Bob, I came to your office, your home, whatever, to talk with you about your contribution to uh, to the uh federation campaign. Um, I realize that you are probably bombarded with requests from all over and I also realize because the assets that you have now are relatively recent you're probably not sure ultimately what your level of giving should be and so on. While it may be - while it's so that people at your level give enormous amounts of money to this, I - I can understand why at this point, you would want to make a pledge on a conservative basis and, and um, and I'm proposing that you give- that you pledge a gift of a hundred thousand dollars, which is not [17:00] an exorbitant amount

based upon uh, the - you know, the good fortune that has been brought to you um, and that uh-

**Audience member:** I like that line. That's a great line.

**Audience member:** That's a clincher [unclear], a guilt clincher.

**Audience member:** [continues] No no no, I'm not trying to invoke guilt, in other words, if she's talking, if she's talking about somebody who who ought to be giving a hundred thousand, he probably could give a million! Right? But! It's not gonna affect his lifestyle, but he's not prepared to do that because he doesn't know who else is gonna be coming to him and what's gonna happen and how is he gonna manage the money [inaudible]

**Audience member:** [unclear] education, too, because look here-

**Audience member:** [continues] So give him a sense that what you're asking is, is lower than what you think he is capable of giving, but you respect his need not to rush into things.

**Audience member:** Well, and that's what I've done.

Audience member: [continues] And let him think, let 'em know your hundred-thousand dollar request is not a, an exorbitant amount.

**Audience member:** But when he's giving the same eight thousand dollars as your cobbler on main street, it puts him in an embarrassing situation which then - he didn't feel comfortable



giving out of the embarrassment [18:00] so he's gotta give out of-

**Audience member:** IS there any way you could take him on an Israel trip?

**Audience member:** Well, I've invited him to Israel in November.

**Audience member:** [continues] Or have him do something like that, where it really gets to your heartstrings.

**Audience member:** We're also gonna publish in Seattle, we're gonna try something again this year that we haven't done since 1960-something. We're gonna publish in - just in broad categories -

**Audience member:** Where people are giving. Y'know, I know some people don't like that, but I think it's good because I think you need to see who's giving twenty thousand dollars, and you say oh, you know what, that person and I make the same income and you know what, I guess I should be-

**Audience member:** I think you're missing the point. I think it's exactly the same situation as recently-widowed women, whose husbands left them a lot of money. It's not a question of how great the need is. It's not a question of of uh, of their embarrassment. It is a fear that people have recently come into money or recently in charge of money, have a fear that, that

they'll be irresponsible and it'll all be [19:00] gone and they've heard of all sorts of stories etcetera. And I think you really need to, to appreciate, acknowledge, respect that fear. Whether it's this kind of a guy or whether it's a woman whose husband died and left her an enormous amount of money. And and also, or by the way, um, uh, people who did make a lot of money and are retired and all of a sudden have this, this, they also have this fear that inflation is gonna eat up everything that they've really put away. Those fears have to be respect and I think you have to talk to those fears and give 'em - and and let - and give them the assurance that you are not asking them to jeopardize their future. That the amount that you're requesting and the ability to pay it off gradually and if, I don't know if Herb would agree with this, but I would even say if somebody continues to exhibit that fear, I would say that um, then perhaps what you need to do, or what - is to make this pledge contingent upon your right to ultimately change it, [20:00] 'cause we're talking about a gift you're likely to give over three years. If you see that that hundred thousand dollars, thirty-three thousand dollars a year, if you see that after the first year that this, that you have overstepped the bounds, then Joe the federation executive and y'know, uh uh, Janice who's

here with me, etecetera, will respect your right to modify that gift. Now I don't know if that's appropriate, but -

**Herbert A. Friedman**: Take another year to pay it off.

**Audience member**: Right.

**Audience member**: The only reason I bring up this one person 'cause that's also the CEO of a major company that's giving huge dollars to a non-Jewish organization because it's a public company, and they're giving huge money.

**Herbert A. Friedman**: You say you're gonna invite him uh, to come on a mission in November.

**Audience member**: No, not a mission. I'm taking the senator from my state and I wanted him to come with us.

**Audience member**: This guy has the compassion and the -

**Audience member**: He's got heart.

**Audience member**: he's got all the right elements, I mean he is a Les Wexner in the making. I think.

**Audience member**: If this is the guy-

[audience commotion] [21:00]

**Herbert A. Friedman**: Uh, what I wanted to say was this. Uh, uh, Cynthia. If it's you and the senator and Mr. X, the senator's gonna get very good treatment in Israel. Mister Indic, the American ambassador in uh, Israel, is gonna get notice that the

senator's coming and the American ambassador in Israel is gonna take him and introduce him to the Prime Minister.

**Cynthia:** It's a lady.

**Herbert A. Friedman:** It's a lady. The senator is, well they'll introduce her to the Prime Minister, take Mr. X along to the visit.

**Cynthia:** That's why I invited him!

**Herbert A. Friedman:** Take him along to the visit with the Prime Minister. After the appointment with the Prime Minister has been set, [22:00] then take him to the foreign minister, alone. Take him to the finance minister, take him to the defense minister, give this guy the feeling that he lives in an important group of people and at important levels. And the fact that he has been brought to the Prime Minister by the American ambassador together with the senator gives this guy the feeling that hey, there, they must think I'm important. And what you have to do is to get this guy to think that he is important inside of a Jewish framework.

**Cynthia:** That's exactly what he's important now in the community in the national community, now I gotta get 'em, he's a Jew, and this is his obligation.

**Herbert A. Friedman**: Now all these additional appointments for him and all the additional bells and whistles that you can organize around him and if you can get him to stay an extra day beyond when [23:00] the senator is staying, 'cause she'll stay two days.

**Cynthia**: No, she's staying a week.

**Herbert A. Friedman**: Staying a week! You got a week's time?

**Cynthia**: Mmhmm.

**Herbert A. Friedman**: Take him in a helicopter, it'll cost you nine hundred bucks an hour [audience laughs]. What?

**Audience member**: He makes his pledge or else!

**Cynthia**: I just wanna know all the money that I was planning to do this better [unclear]

**Herbert A. Friedman**: [laughs] [inaudible] -the Golan Heights so people understand what the hell that's all about, I don't know what the future of that's gonna be. Whether Assad will bite or whether Assad won't bite and wants to stay hardline and so forget about him, which is what Bibi's present inclination is, forget about him. To hell with him. He's had uh, Christopher's gone to visit him twenty-three times and he's not biting. So I don't care.

**Audience member:** Herb, do you not think that taking somebody to Israel now, given Israel's current economic state, particularly somebody who might be donating a lot of money to to, uh inner-city [24:00] ghetto problems and so on, where he sees real poverty, do you not think the possibility that uh bringing him to Israel and getting uh, getting the, you know, the wine and dine treatment and so on might actually leave them feeling Israel does not need my help?

**Herbert A. Friedman:** He doesn't know anything about Israel I'm assuming. What does he know? You're taking somebody virginal and you're trying to introduce him into a complex situation. So deal with the immediate thing that he does know from the public press .he knows there's a problem with getting peace going here, okay. So take him to the sensitive areas in regard to that. [coughs] Excuse me. You can get the Israel ambassador to arrange with the Jordanian ambassador for him to go over and meet uh uh, the crown prince of Jordan, the king's getting kinda ill now.

**Audience member:** No no, I understand all that -  
[commotion, unclear]

**Herbert A. Friedman:** He's not gonna be aware of the fact that Israel doesn't need any money. He's not a sophisticated Jew. Conversely, take him to leading industrialist in the country, a

guy by the name of Steph Wertheimer, who's got a factory up in the Galilee and he's the biggest single dollar earner in terms of exports, he makes all the turbines for the Rolls Royce motors that uh, are used on the largest uh, aircraft in the world, the 747. They're all made in Israel. And this guy's, a Dutch Jew who came over to the country thirty years ago and developed this uh, this magnificent uh, factory up near Haifa. Um, I don't know what business this gu-this young fellow is in, but whatever business he's in, he meets an industrialist like Steph Wertheimer and he- and that's as good as meeting the defense minister. So inside of that week, you, you, you -

**Cynthia:** Well I figure that's my opportunity to get him.

**Herbert A. Friedman:** That's your opportunity [26:00] is right. The other thing I heard in the course of the discussion was about, we haven't done this since the nineteen sixties, but we're now gonna publish a book. The book is a marvelous tool. And the fact that you haven't used it for thirty years shows some uh, laxity of judgement, let me put it mildly. Uh, the best system I ever saw was developed in Detroit, I know all the arguments. We can't print anybody's name, other people get insulted, people who - blahblahblahblahblahblah... Detroit has a uh, Jewish population of about seventy thousand, well it's

much less now, the rust belt has uh, has hemorrhaged. Maybe fifty thousand people. Doesn't matter. They print the book with name and amount! Not just in categories, one thousand to five thousand. Name and amount. And they print the book in a limited edition of five hundred copies and right on the frontispiece of the book it says, limited edition, five hundre- thee hundred and twelve, this is number three hundred and twelve out of five hundred copies. And the book is distributed to the first five hundred people who then sign for it and have to return it in two days. And then the five hundred copies are distributed to the next bunch of people who have to sign for it, it's like return receipt requested! They get regist-registered mail. And then they have to return it in two days, and this edition of only five hundred copies passes through the twelve thousand contributors of the city of Detroit within about a month. Everybody has seen the limited [28:00] edition! But by printing it only in limited edition, you reduce the uh, the antagonism towards printing it at all. Don't stop printing the book because some people don't like it. Try to figure out how to make it a bit more palatable, that's all I'm saying. And Detroit followed it and used that system successfully for years now.

**Audience member:** And we- we looked at [unclear] Vancouver's.



**Audience member:** Yeah, 'cause in Portland, we actually - we ask people, something is sent out, we're gonna do it, and they have a chance. If they don't send it back, we assume that it's okay to print their name. If they send it back to say don't include it, and then it's printed on a biweekly basis, it comes out with our - with our biweekly Jewish newspaper. It's actually listed in the newspaper.

**Herbert A. Friedman:** So what do you mean that you haven't done it since the sixties?

**Audience member:** That's the [unclear]

**Audience member:** Different communities.

**Herbert A. Friedman:** Oh! [29:00] All right.

[audience commotion]

**Herbert A. Friedman:** Whoa whoa whoa, but but but, one at a time!

[raps on table]

**Audience member:** I'm sorry, I'm sorry.

**Audience member:** I was just gonna say, the one thing I keep thinking about, Herb, is that is that, there's nothing more compelling than a good second-line campaign right now I think right now. [audience commotion] I think you're right on, you have - I'm not sure if your program, I'm not sure it doesn't need some tweaking, but y'know, that's what needs to happen,

that's what, y'know, that's what a lot of this new generation of givers, that's what they can buy into. They can be a part of history. It's an easier sell, it's a lot easier sell.

**Audience member:** But what is this second-line campaign?

**Audience member:** Save our children, whatever you wanna call it, I mean.

**Audience member:** Operation Exodus.

**Audience member:** Or second line - [inaudible]

**Audience member:** It's an operation-

**Audience member:** I- I understand, okay.

**Herbert A. Friedman:** Um, I think we're done with that page.

[audience laughs] Number G said reminds you to read those answers that I gave, not now, take - take the next pages, seventeen, eighteen, twenty-one, where did we go, twenty-through twenty-two, pages seventeen through twenty-two. Those five pages, read 'em later, you'll see all the, the put offs and the way we suggest that you can turn the thing around. Um, you get to page twenty-three and it's um, the minor role of the leader to be a manger but it's part of what you have to do, you gotta do it. There just really two, two basic things that I, that I picked out, or three. [31:00] One was how to pick people for boards, that's gotta be your responsibility, number two, to

keep an eye on all the agencies in town and figure out with your executive director, devote some time to those. And the third the thing is, uhm, keeping an eye on the budget. Now I repeat, this is a minor role, I repeat, this should be done at a time - these things should should be done at a time of the year not during campaign pressure time, not during the time that you're building attendance for the next mission, not during any major operation that you're involved in. but during the course of twelve months, I don't know how much time you devote to running your campaign, but the campaign oughta be knocked off within ninety days, it shouldn't take any more than that.

**Audience member:** Focusing on how to pick people for [32:00] boards just for a moment, again, recognizing some people have certain strengths, certain weaknesses and certain skillsets that overlap the various categories here, having said that if you were to have twenty people on a board, in your own mind, how many would you sorta lump - where would you put the greatest emphasis on? Pragmatism, intellectuals, fundraisers, um.

**Herbert A. Friedman:** Well, look. Um. I put- I-I sifted through my own mind and figured that these five categories of people were just about all-embracing, that-that covers everything I would want. Um, I think uh, a-a grou- if you're using twenty

people as a model, twenty people, okay, um, under intellectuals number one, I'd put uh, three. Under pragmatists, I would put six [33:00]. Under fundraisers, I would put uh, six or seven. Let's say seven.

**Audience member:** Fundraisers?

**Herbert A. Friedman:** Yeah.

**Audience member:** Out of how many is this?

**Herbert A. Friedman:** Twenty. Under compromisers, two. Under power brokers, oh, won't come to every meeting and whose advice you're gonna have to get separately and report at the meeting. We talk to Sam Strong and Sam can't come he's running a baseball team and he's busy and bahbahbahbah! But sam understands about this problem and Sam said to me that he - that I could report to the meeting that his opinion is so and so, so. And po- because power brokers are bid, are always the busiest of all people. You want them on your board, you're not gonna get maximum attendance [34:00] from them, but you could always get opinion from them which they will allow you to quote publicly so that's the next best thing to having them there in person. And so you need two, and I think that comes to twenty.

**Audience member:** It does.

**Herbert A. Friedman**: That's how I would balance that thing if I, y'know, if I were all alone and wasn't bothering with anybody and only consulting with my executive director and I didn't have a nominating committee that I had to listen to ten other opinions and this is the way I would make up the list. Then, if you have to bother to go through the whole process business and submit it to a nominating committee, okay, but at least you've got your picks made and known public and if the nominating committee wants to fool around with you then, you know, you've gotta figure out how much flexibility you wanna use.

**Audience member**: Some of these are gonna overlap, you're gonna find pragmatists who are power brokers, or intellectuals who are compromisers and so on. You gotta make adjustments on those lines.

**Herbert A. Friedman**: Well okay. Sure. As far as running the agencies, running an agency, is concerned, this is an item that I put here because in most towns, most towns, the agency system or subsystem of the federation works pretty smoothly. There aren't very many crises that occur, there aren't very many uh, uh, sudden uh, emergencies where you have to be called away from what you're doing in order to solve some burning problem. Doesn't happen very often. The thing that does happen is a sort

of a deterioration takes place inside of an agency which, which doesn't have good [36:00] mon-monitoring and where its own executive direction isn't good and where there might be ego squabbles uh, between uh, its head and uh its board uh. In other words, not a [claps hands] sharp crises situation, but a slow deteriorating situation in where you suddenly wake up and say hey, that thing is is is not running right, we're getting feedback, a Jewish family agency uh, y'know, doesn't matter which one and we're getting feedback that they're short tempered with people um, and the executive director is very defensive and he says, listen, I haven't got enough staff, I just can't, you don't give me enough money and uh, I'm shorthanded and uh, y'know, Charlie shaking his head.

**Audience member:** They always say that!

**Herbert A. Friedman:** Yeah, right! Okay. Um, you the leader, [37:00] somehow or other, you have to keep tuned in and if you become aware that there is a deteriorating situation in an agency, you gotta devote some time to solv-to correcting it. And it's usually the result not of the most common complaint, namely lack of money, it's usually the result of a human problem either with the professional director or the lay leader directo-head, the chairman. And so if-you-if you, once you do your detective

work and your own intuition tells you which one it is, then you gotta sit down with the person involved and say hey, c'mon, we gotta, we gotta fix this. So I'm not saying it has to take a lot of time and I'm not saying that you oughta poke your nose into it , uh, it's really the-the monitoring really has to come from the executive director, it's his age-there are all these agents that're under him, and he's the poppa and uh, they look-each one has its own professional director, but they should look to him for guidance and support and help when they need help um, sometimes that never happens, sometimes you have aggravated situations where an agency director fights with the executive director and one of those two *boychiks* has to go. Sometimes it reaches that bad a thing, where you just gotta break it up and and there's gotta be a divorce. They can't work together. That's rare. So all I'm saying is, it's a minor item but you gotta keep your eye on it and that's all there is to it.

Um, number C as far as the budget's concerned, that's also a minor item because that only occurs once a year. And uhm, and I have found in my own experience that I don't know what your fiscal year is in your community but my fiscal year in the Wexner Heritage Program is July 1. Why July 1? Because the time it takes me to prepare the budget is like, June and part of May,

and by that time, my work is done. We're - we're sliding down to the end. The summer institute in June is prepared and most of it locked-in by uh, Pesach, by April. Sure, somebody falls out and I gotta get a replacement, sure there are last minutes adjustments have to take place, but my work is done by about uh, the end of April, beginning of May, that's when I suddenly have an easier spell and I can sit down and pay attention to the budget. And I wanna have the budget in Mr. Wexner's hands by the first week in June, if - and then, then, I don't hear from him. I send him a one page spreadsh-I got a hundred pages of backup behind that, I got the cost of every airplane fare a year in advance, so far as I can get it from bringing professor Larry Hoffman from new York to San Diego and the cost of the hotel in San Diego and back and the cab fare and the blahblahblah and I know what it's gonna cost me for those six sessions [41:00] in San Diego to get professor Hoffman from new York to that town. Okay. So I got really a hundred pages of backup but it's all condensed on one-on one page with thirty-two lines on it that says um, uh, seminar costs, semi-biweekly seminar costs. That's one line. Three hundred nad twelve thousand dollars. And whatever it is, I got all the pages behind it documented and uh, [audience member coughs] [inaudible] He doesn't wanna read a



hundred pages, he'll read the one page. And I don't hear anything. He doesn't say yes, he doesn't say no. but July first, I start spending according to that budget. So I got the easiest situation in the world because he's the most remarkable wonderful [42:00] man to work with. Now [unclear] he expects me to exercise due diligence, he expect some to be very sharp, he knows my track record, I ran the UJA for I don't know how many dozen years with a three-percent overhead budget and it never, never ,never went over and was always under. And I don't care how much money I raised, if it was a sixty million dollar level it was three percent, and if it was at a seven hundred million dollar level, it was at three percent. 'Cause that was a kind of an absolutely arbitrary, stupid, meaningless, not logical but simply ritualistic. There isn't a lay leader in the world that can complain about a three percent overhead budget, it's just arbitrary. And yet - we did our business [43:00] within that budget.

**Audience member:** You're saying that ninety seven percent of every dollar went to a cause?

**Herbert A. Friedman:** No, because there's an - there's a, there's an addition to the national overhead cost, there's a local overhead cost. Now I don't know what his local overhead cost is-

**Audience member:** On the national level. The money that came in to you nationally, ninety-seven cents on the dollar went out?

**Herbert A. Friedman:** That's correct. You're absolutely correct.

AM: But that's after- [**inaudible**]

**Herbert A. Friedman:** Now it's a question of - but but if somebody says-

**Audience member:** But it's also before a little *tchotchkes* you know, Israel and Jewish agencies and etcetera have their twelve percent or fourteen, fifteen percent.

**Herbert A. Friedman:** Well, if somebody says to me what does it cost to raise that dollar, it cost three percent at the national level and it cost x percent at the local level. At the local level, an average that I tried to suggest over and over and over again and I have no control over it, was somewhere around twelve percent. And the range went from [44:00] to this day, somewhere goes between twelve and fifteen, some as high as sixteen, so if you add three percent on the national and call it fifteen percent at the local, you got an eighteen percent total cost to raise that dollar at the point out there in the field where the dollar is raised to the point where the dollar goes over to Israel.

**Audience member:** And in Israel, there's another percent which would even be regarded, to a certain extent, as their cost of raising the money that they got from UJA.

**Herbert A. Friedman:** No. They can only put an overhead cost on it for the cost of their personnel to administer the program. But that's program money.

**Audience member:** Does UJA attempt to control the demand controls over that percent? Does UJA say to a beneficiary agency in Israel, we insist that only eight percent of your budget is administrative cost, twelve percent or three percent or fifteen percent- [45:00]

[audience commotion, **unclear**]

**Audience member:** Moshe, just - I used to work in the Jewish agency budget department and my job was explaining the budget to the diaspora communities. The overhead there, the true overhead, is extremely low because A, their personnel are paid extremely low and secondly because most of their personnel are service delivery personnel, not administrative, it is very easy to be deceived by walking into the big building and you see the tea lady come around ,but that's a very tiny tiny percent, and Neil Katz [?] and I did some uh, figuring a few years back on what the true overhead was of the Jewish agency was, of real actual

administrative, it was, it was like such a tiny percentage and I don't remember if it was one and a half, [unclear] [audience member coughs] something like that.

**Herbert A. Friedman**: Insignificant.

**Audience member**: [continues] It's almost insignificant because virtually all the money that goes there is service delivery money.

**Herbert A. Friedman**: That's the key, see, that's the technical phrase that most lay leaders don't know, service delivery is not - is not overhead, service delivery is part of what it costs you [46:00] to deliver the service to that Russian immigrant.

**Audience member**: I think Moshe's asking about program costs themselves and if, am I right about that?

**Moshe**: Well the budget is mostly scrutinized in terms of program-

[audience commotion, inaudible]

**Moshe**: [continues] -and I-I certainly accept that if, let's assume some youth village gets a hundred thousand dollars and they spend forty thousand dollars of that on, on uh, on uh, counselors and they spend twenty thousand dollar so food and fifty thousand dollars on housing I'm not gonna say, y'know, that they - that they have eighty-five percent administrative

costs. Uh, that to me is the delivery of the, of the product.  
But - [audience commotion] [unclear] I kinda have this this  
general uh, uh, y'know, feeling or impression from absolutely no  
basis of fact that uh, that there's a lot of money or there has  
been a lot of money wasted in Israel on paying peoples salaries  
that that are not crucial to the mission [47:00] and I bas that  
probably on the few years that I lived in Israel and I saw the  
government works.

**Audience member:** Even, even, some of our lay leaders and Herb I  
don't know if you remember the year that Stanley Frankl[?] wrote  
an article in the Jerusalem Post which he started by saying, all  
the Jewish agency is is a bunch of Volvos and drivers waiting to  
drive to [unclear]. And it's really not true, the amount of uh,  
actual administrative overhead is, is, miniscule.

**Moshe:** I'm gla-I'm thrilled to hear that.

**Herbert A. Friedman:** Do you con-do you confir-

[recording cuts out 47:26 to 47:31]

[background noise and conversation the group, 47:34 to 51:48]

**Herbert A. Friedman:** Ladies and gentlemen. Don! [laughs]

[inaudible]

[commotion dies down]

Herbert A. Friedman: ...Michael, there's Michael. [unclear] Gary, where are you? Absent, not here.

Audience member: Who's absent?

Herbert A. Friedman: He showed up yesterday. Larry [unclear], there you are. [unclear] Levitt, there you are. The Roths, where are the Roths?

Audience member: The Roths are right here.

Audience member: In your honor, sir.

Herbert A. Friedman: Thank you! Charlie, [unclear], [unclear], Cynthia, Jordana, and Andy - where- there you are, everybody's here, everybody's here except Jaffee, did he go out of town again? He's a reporter, he's a radio reporter for the- at the Unabomb trial uh and his office keeps calling him so, the first day he wasn't here, the second day he was, third day, I think he was, fourth day now he's not. But uh, y'know I'm explaining uh, his absence [audience member clears throat]. Uh, de Maupassant once wrote a short story called 'La Derniere Classe,' this is the last class. That uh, that story was very poignant and you oughta find time to read it, it's short. It's about the end of the Franco-Prussian War in 1871 when the Germans beat the French. The Germans moved into the two provinces, French provinces, which are closest to Germany - Alsace and Lorraine,

those two, in the northeastern corner of France. And they took it over and the German colonel summoned the mayor and all the town leaders and the town businessmen and so on and so on into the school room and said, from now on, the language of this territory is German and uh, the administration is German, you are now honored to be part of Germany, you're not really worthy of it, but uh, we'll take you in and we'll make uh, good Germans out of you. And um, and uh, everybody wept, there was nothing that could be done about it. And later - the the the- the title of the story, this was the last class in which any French language would be [55:00] heard forever and ever and ever and ever. Because Germany would never release those provinces again. And the mayor asked for permission to make his last, make his closing speech in French and he did, they gave him that permission, and the uh, last paragraph of the story is that in 1918, Alsace and Lorraine were returned to France. Okay. End of story. But that phrase, the title of the story, 'La Derniere Classe' always rings in my mind whenever uh I have had a relationship with a group of people in and and when we come to the last class, then it's over and I won't see you anymore. Uh, until we meet again someplace.

**Audience member:** Are you gonna speak in Hebrew?

**Herbert A. Friedman**: Sir?

**Audience member**: Are you gonna deliver this farewell address in Hebrew?

[audience laughs]

**Herbert A. Friedman**: [laughs] [56:00] Yeah, well, someday that would be possible, if we ever can get uh, if we ever can get uh, a major uh, Hebrew teaching process going in this country. Okay, what I would like to do today is uh, is uh, several things in order to clean up. I'd like to finish the uh, the little booklet, the little outline which I call it, uh, as quickly as possible, number two, if Charlie uh, if Larry remembers the questions he asked me uh, a couple days ago which I promised to answer, and which I have forgotten and he has forgotten [audience laughs] so, maybe, maybe subliminally or unconsciously uh, what he's asking me has been answered in some of the discussion we had in the last couple of days. And thirdly, I would like to- to um, uh, put a four-line summary on the board which um, which would summarize everything. And then I'd like to just leave, y'know, some time for a final good and welfare, any last questions anybody's got in mind.

So let's get rid of the outline fast. Um, let's head over to page uh, page uh, fifteen. [papers shuffling] Where it says-



**Audience member:** Are you gonna be working with the orange outline too?

**Herbert A. Friedman:** No sir.

**Audience member:** We'll just read it.

**Herbert A. Friedman:** I'll answer any questions you want about it, the orange outline was simply uh, hole-punched for you to put in your notebook as uh, as a half a dozen short biographies of really, really top national leaders and you might find some uh, helpful hints in there, uh, for your own, for your own career progress. These half dozen people were national, national, top-top, uh, some of you may have such ambitions. But what's in there's valuable also speaking in terms of a purely local leader, if your top-top and your local community um, you all - you obviously have the talent and the ability to become a national leader. And why shouldn't you? One of your number's already asked me the question um, how does one move up after a successful contribution on the local level, so, it's in at least one person's mind, and that's good! And maybe it's in more of your minds. So we don't have time to go through it, I just offered it to you as a chapter of a memoir that I'm writing [59:00] and I thought it might be worthwhile uh, for you to have it. [page turning] Okay, page fifteen, roman numeral four, and

roman numeral five, the-the leader as fundraiser and the leader as manager is what we're gonna try to knock off just as quickly as possible. The leader as fundraiser means that you have to have an intimate participation in all aspects of the campaign, you can't just sit on the top and direct anybody or everybody. You know the corporate rule that the CEO should never have more than three, four people reporting to him. So if you're the leader of the campaign that raises three million dollar sor thirteen million dollars, doesn't matter, principles the same. You can't have everybody reporting to you, but you have to - you have to be familiar with every phase and stage of the ap- of the operation. And you have to keep your fingers on it through a delegated process. The first, the first thing about any campaign is setting the goal. Somebody came to me with a suggestion that maybe what there oughta be if the national organizations wont do anything then in the local community maybe what we oughta do is setup a capital fundraising a campaign, which every community obviously has, you wanna build a hospital, you wanna build an old folks' home, you wanna build anything, you have a capital fundraising campaign. So if you wanna take care of the Jewish education of your children and their children, run a capital fund campaign for one high school [1:01:00] one chunk for Israel

experience in which you will send all the kids in your town overseas, and maybe you need four-two million for that or maybe you need eight million for that. An done adult education program and any-everything that you want, it's like a cold blow, dump everything connected with uh, uh, efficient education of the next generation into one large capital fund campaign and maybe it'll take twenty-five million dollars or whatever number it is, it doesn't matter, maybe it'll only take twelve million dollars fi your sights are smaller, but instead of trying to raise money piecemeal for each individual piece of the total educational objective, lump it! Do it all together, do it all once, the whole community is-is certainly familiar with that process [1:02:00]. Um, the point is, you have to begin with what's the goal, setting the community goal, and you the leader have got to be the leader in that process 'cause that's the first foundation stone. If you're not clear about that, if you're not clear about what the goal consists of, then the campaign is never gonna succeed. So what I wrote under that was, take part in that process. This will increase your credibility. Not just in later solicitations but in uh, in selling the thing conceptually. In making speeches about it, in going to the local rotary club and let the non-Jews know what you're doing. Go to the chamber of

commerce 'cause you're gonna ask them for contributions to it, you certainly should. If you got a general big capital fund campaign in the city, among the Jewish population, it's no secret to the non-Jews. And those of them who are concerned about the United Way and the Red Cross and all the big major co-total community campaigns always begin to get a little [unclear] of-of fear uh, when the Jews are coming out for a big campaign cos they say, oh my God, Jesus, this is gonna hurt us because the best most charitable people in town are always the Jews, always - in every town. And the total communal campaigns are very interested in knowing about Jewish campaigns and in taking part of them and the electric company makes a contribution and the gas company makes a contribution, and the leading banks make contributions, and the rotary club makes a contribution [1:04:00] if you go and ask for it. You don't ask for it, nobody's gonna walk up to the window to offer it. So you must have full knowledge of how the goal is established and why it was established and who participated in the conversations and back under chapter three, uh, I had a description of uh, of how a goal oughta be set. Um, August, September, or July, August, before the next year' campaign begins. You get a big one-day retreat of a whole bunch of people to get them to participate in

the setting of the goal. Any questions about goal setting before we leave it?

**Audience member:** You said the goal, are you talking about the number or are you talking about -

**Herbert A. Friedman:** The number! And - and the basic, the broad outlines of what, of of what, uh, that number represents, [1:05:00] what constitutes that number.

**Audience member:** Okay, got it.

**Audience member:** I also wanna say, I didn't get a chance to make a comment yesterday, that setting the goal whether it's a money goal or some other kind of goal, right at the very front. And you always shave it right at the very first thing that you're uh, in all of these lists.

**Herbert A. Friedman:** Right.

**Audience member:** [continues] Is establishing the vision upfront. It's always there for everybody to see and go after.

**Herbert A. Friedman:** Exactly. Precisely.

**Audience member:** [continues] and then that's a val-that's an equally valuable in business and for-profit organizations as the nonprofits.

**Herbert A. Friedman:** Sure. Absolutely. It's always done. Stock market figures of worth and value of a company are determined by

whether the company achieves what it announced at the beginning would be its profit for the year, and then the value fo the stock is determined by how close they came to it or the-the total capital [1:06:00] value or the, or the dividends. If they say we're gonna distribute four dollars' worth of dividends this year, and they come out and they distribute five dividends, you know what happens to the price. And if they come out and announce at the end, two dollars' worth of dividends uh, you know what happens to the price. So that announcing up at, up front, what you're gonna do uh, is always uh, um, the best thing because then nobody can whine, nobody can complain. You-you've been up front from the start, this is what we're gonna look- this is the money we're seeking for and here is the reason why we're seeking for this money. Okay.

'B,' we're now the rabbi as fundraiser. Uh uh, so, you have to make your own gift first. Before you ask anybody else for anything. [1:07:00] if you don't do it, then, you' know, the - the whole heaven isn't gonna cave in, but you're gonna have a hell of a better campaign and you're gonna have a hell of a better bunch of solicitors working for you if uh, if you've stepped up to the plate first and you gotta do the maximum you can do. Some people have a funny notion, well, y'know, I have to

save something for later because later, 'cause later on when we have the third meeting and the fourth meeting and things are lagging a little bit, and we wanna give everybody another shot in the arm, if I - if I, if I stand up and say, well fellas, look, last year I gave three thousand bucks and at the beginning of this campaign I announced that I'd give five thousand bucks but uh, uhm, I think that uh, we need another shot and so I'll add another thousand bucks. Let 'em start with six. Not five. And nevermind adding something later. That's not gonna change many [1:08:00] people. Yeah a few people will follow suit, I'll never forget what happened in that, what I call that brilliant campaign of Operation Exodus which raised one billion dollars more money above and beyond five annual campaigns. Exodus One and Exodus Two were both started by Mr. Wexner. Mr. Wexner exercised the role of leader in the best noblest uh, classical definition of the term. He called a meeting uh, of um, I don't know, twelve or fifteen people in his house ehheh at breakfast, everybody's busy, called a meeting, took an hour. And he said I don't have to tell [1:09:00] you about the Russian thing, you all know about it, you don't - you're dead, you're not awake, you don't read the new York times let alone any news. Um, and so what I want is um, a whole bunch of people to follow suit with

me and uh, I wanna start this off at six million bucks. Nobody followed suit. One guy called Andenberg[?] in California uh, who wasn't at the meeting and uh, Andenberg over the telephone said uh, I'll chip in fifteen. Most of the people, not most, several of the people uh, um, came in at three each. And then there were tailed off, and there were a bunch of ones.

**Audience member:** Are we talking millions?

**Herbert A. Friedman:** Sure. A million, yeah millions.

**Audience member:** Remember yesterday?

**Audience member:** Never mind, three. I didn't know if it was three hundred thousand-

**Herbert A. Friedman:** Millions, millions.

**Audience member:** I assume.

**Herbert A. Friedman:** Hundred thousand would be called 'a hundred.' A million is 'one.' [laughs] Okay. Um, and those guys uh, I think it came to about uh, thirty million from uh, I think eight or nine of 'em pledged, one or two of 'em didn't. Three years later, Exodus Two started and uh, Wexner called a meeting and it was about uh, thirty people this time and ti was too big for breakfast at hi house so they had it at a hotel. Bottom line, they came out at sixty-seven million. Wexner started at seven, not six. So the one billion dollars [1:11:00] that was



raised, Wexner chipped in thirteen, six and seven. Andenberg chipped in fifteen. Those were the two largest gifts in America. And the second meeting went the same way, only better, because when Le-when Wexner started he said, hey, look, last time I gave six, I asked you to follow me. You didn't. I'm gonna start this time with seven and what I'd like you to follow me with is six, will you do the six now? You should've done it the first time but you didn't, how about doing it now and a half dozen guys came in at six. The cumulative effect worked. Um, but in each case, [pounds on table] he decided his own gift first. And he didn't want- he wasn't coy, eh wasn't being cute, he didn't give a damn if nobody followed him. He was doing what he thought was the right thing to do. And that's what a leader has to do. So that's point 'B,' you gotta decide your own gift. And make it the maximum that you can manage, and and and don't save anything for later. When Exodus One started, we weren't sure that there would d-be an Exodus Two. Few of us were, most weren't, but when it became clear a couple years later that we'd have to continue doing this, uh, then uh, it was a new round, and again you have to come in with the maximum.

**Cynthia:** Herb?

**Herbert A. Friedman:** Yeah?

**Cynthia:** There are no unworthy causes so let's say somebody -

**Herbert A. Friedman:** I'm sorry, I didn't hear-

**Cynthia:** There are no unworthy causes.

**Herbert A. Friedman:** I disagree.

**Cynthia:** Well okay, the- that's not the issue. There are many worthy causes, thank you.

**Herbert A. Friedman:** Okay, okay, okay.

**Cynthia:** [continues] so here comes along Exodus and I say okay, I'll give you a gazillion, that's it. That's the most I can manage and then two years later when the next campaign comes around, I'm not finished paying off that first one and I can't give a gazillion [1:13:00] again-

**Herbert A. Friedman:** Well, and nobody was, Cynthia, because they had five years to pay their pledges off. They spr-the pledges made to Exodus, either one or two, were five year-

**Cynthia:** I think the fear that we have is that we're being approached from so many different sources and angles and so many causes.

**Herbert A. Friedman:** You said you look through those notes that I made about the arguments that give, uh uh, for not giving, and one of them is, well, c'mon, you're gonna come back to me next

year, aren't you? Yes, you're gonna come back to 'em next year, you're gonna be breathing again, you're gonna be eating next again, you're still alive next year, yeah sure, sure, you're gonna - we'll come to you next year. I told you what my walking out line is, 'see you next year, Harry.'

**Audience member:** You say that and I hear Cynthia also saying it's not only from one place, it's from every [1:14:00] place at once sometimes.

**Herbert A. Friedman:** Well here you have to make a decision and this is why I didn't mean to be rude, bu- and interrupt, but I-I disagree really, fundamentally, that all causes-

**Cynthia:** I retract that statement.

**Herbert A. Friedman:** All right, okay. So there are things that you can say no to, that's my point. There are things that you can say no to, you do not ha-[coughs] there was one man uh, from uh, San Francisco his name was Benjamin Swig, he owned the Fairmont Hotel, you all have heard of the family if you don't know them personally. Ben Swig was the most generous man in the community in terms of the total number of dollars he gave away, but he himself, he himself knew that he was doing it all wrong. Because Ben Swig used to carry a card in his pocket with the name and the amount [1:15:00] of every single organization to

which he contributed money. And there was no year of his life when there were fewer than 250 names on an annual list. Annual list. It came to seven or eight or a hundred thousand dollars, whatever the sum was, but you can't give money to 250 organizations and you can't dole out a thousand dollars here, and five hundred dollars here, and twenty-five thousand dollars there and keep going keep going keep going ... as if every single thing is of equal merit, that is deserves something from you. No. Charlie, uh, Larry?

**Larry:** Um, back to - not disagreeing on the issue that the person that's not contributing the most if he establishes credibility he can go out and solicit people that are gonna contribute a lot more, but how do you really establish that credibility? I give you an example of the guy who had the corner store and contributed eight thousand dollars, how did he really - I mean he started pulling out his tax return or, y'know uh, establish the credibility among people. It's [unclear] a person has a known salary for example, you know this person's a public figure and his or her salary's x, so then the credibility's established when that person who makes x gives y, you see somebody in the business world or a profession and they give x

or y, how do you know they're really maxing out, how do you establish it?

**Herbert A. Friedman**: There's no mechanical way to establish it, there's no yardstick by which to measure it uh, in a, in a mechanical way. Credibility is established by your conduct and basically there are two sets of conduct. There's your public conduct and there's your private conduct. People become presidents of the United States and then a half a dozen women sue them for uh, y'know [1:17:00] infidelity or all that kinda stuff. So that's your private-your private credibility comes under attack and under fire and your public credibility may stand the perfect test. Everybody thinks that Jack Kennedy was the most wonderful, charming, Camelot-type, we love that kind fo a young, dashing figure and at the same time, everybody knew what his private life was like. It was very active. He was a very virile man, even with his bad back, so um, I am talking about uh, a person who, whose public conduct and private conduct come as near as possible to being perfect, as near as possible, we're all only human, and whose financial ability is known within parameters. He had [1:18:00] the single shoe store, it was not a chain, it was on the main street, everybody knew how many times they did or didn't go and buy shoes from him. Look,

today, no-no, very few people own the shoe store on main street. But everybody has a kind of a, a general, broad-based idea of what the income of a lawyer is. If he's in such and such a firm of such and such a standard and if he's already made partner and he's been there ten years, and if the knowledge of what the firm distributes at the end of the year becomes - to its partners - becomes kinda general, not specific, public knowledge then more or less you know that that guy probably drew between salary and bonus, three hundred to three hundred and fifty thousand bucks a year. You know, in general. So can this [1:19:00] and and - can this guy say, oh really, listen all I can afford to give is a thousand bucks? Now you know that he's ducking until you may - and there are all kinds of exceptions but uh, I use done the other day, he's paying some kind of exorbitant fee to keep his mother in an old folks' home somewhere. Sure, but leaving out the exceptions, the rule is he's got two kids in college. Everybody knows what that costs, it's thirty-grand a year now, in in in the big schools. So if you got sixty grand worth of [bangs table] after-tax money to pay out of the three-fifty that you're earning, that's a chunk. So maybe he can't give you twenty-five thousand dollars, but he also can't give you one thousand dollars. And the measure in your question, how do you

measure [unclear], it's gotta be just as broad as that, Larry [1:20:00] but it's possible to know what is a fair, moral gift and what's really uh, ducking. Yeah.

Audience member: I was gonna say, Herb, that we had a cobbler in Seattle who left a triple-dig- a triple-digit millions in uh, in ...

Herbert A. Friedman: Yeah what's that, that's that-

Audience member: Samis. Sam Israel.

Herbert A. Friedman: How do you spell it?

Audience member: S-A-M-I-S. Which is Sam Israel.

Herbert A. Friedman: Oh, Sam Israel! Oh.

Audience member: The SAMIS Foundation.

Audience member: He was a cobbler.

Herbert A. Friedman: He was a carpenter. A cobbler! A cobbler, okay. All right.

Audience member: [inaudible] You're right, you get a sense of the [unclear].

Herbert A. Friedman: Okay. Um. Moshe?

Moshe: Yeah, uhm, I think it's not really a direct answer to Larry's question but your topic is, what you were discussing at that point is not what somebody else should be giving, but what [1:21:00] we - I - need to give.

**Herbert A. Friedman**: That's right.

**Moshe**: [continues] And uh, and I think that I can't speak for, y'know for people in the business or other professions, but you gave the example the other day where in reality, you, you in a sense forced a gift of seven million dollars by accept the challenging of a high percentage of your own gifts. You gave five, he gave five.

**Herbert A. Friedman**: Yeah, but I couldn't do it every year.

[**unclear**] Under the pressure and under the challenge and knowing what we were shooting for, sure it was worth it.

**Moshe**: So I think that um, I think that for those of us who either whose income is known or who have a or or whose may be generally known, maybe let's say an attorney, what have you, um, in announcing that first gift I think that if indeed we are giving as much as we can, think that what we do need to do is announce it uh, uh, in figure and percentage. Uh, in other words, I'm - I'm about to launch a campaign to build a, to build a sanctuary at my synagogue. And I've been thinking over these couple of days, what my gift should be. And I - I think that I can give a gift that's not gonna come anywhere near what I want, what I expect from the rest of the congregation, from many people in the congregation, but I would challenge them by saying



that you all know what I earn, I'm gonna give - I'm gonna pledge, over the next five years, to give ten percent of my annual salary which is x amount of money. And I, I think that uh, that might be a way to um, challenge the others and also know that I'm, that I'm giving the maximum that I could. For something that I believe in.

**Herbert A. Friedman**: That's okay. There's nothing wrong with that. You're taking - take a case of rabbis' salaries [1:23:00], we started something a long time ago called the UJA Rabbinic Cabinet, and uhm, that's not the same thing as trying to get a hundred percent of members' contributions, but rabbinical contributions and they set a standard that they would like to try to achieve that every rabbi in America should give at least a thousand dollars to the campaign to the annual campaign in his community. They've almost gotten to a hundred percent and that means there're several thousand rabbis in America, each of whom is chipping a minimum of one thousand dollars. That's a big chunk of money! That's three hundred thousand bucks- that, that's three million bucks! Three thousand guys at a thousand dollars apiece, that's three million dollars. That the rabbis, out of salaries, some of which have grown quite astronomical, there're rabbinical salaries that are up at the two hundred

thousand [1:24:00] dollar level. But most are not. And you uh, and rabbinical salaries range uh, from seventy-five thousand dollars to hundred and twenty-five thousand dollars and for a guy to give a thousand bucks out of that, he - after tax, y'know year after year, because and then he gets hit and next year he's gonna, he tries to give eleven hundred bucks. That's good. That's very good.

**Audience member:** And are also faced with giv-more requests from charities than almost anyone else.

**Herbert A. Friedman:** Sure, sure, sure. So there's a splendid record developing among uh uh, the rabbinical population of America. Would that the medical population fo America would rise to that standard, or the legal population of America. Or the stockbroker population of America. Cynthia?

**Cynthia:** Um, what about the- the CEO of company.

**Herbert A. Friedman:** The which?

**Cynthia:** A CEO of a major company [1:25:00] who gives corporately, his business gives and he thinks that he's off the hook 'cause his business sis making a big donation. Now there's differences whether its' a public company or a privately held company, but um.

**Herbert A. Friedman**: So tell me what you mean by the first two words, 'what about'?

**Cynthia**: Well, what-

**Audience member**: How d'you hit him.

**Cynthia**: Yeah, thank you.

**Audience member**: What do you say to him when he says, we're very-

**Cynthia**: I give! My company's giving a hundred thousand-

**Audience member**: I give! A B C incorporated has just donated, y'know, four hundred thousand dollars to...

**Herbert A. Friedman**: Well, I'll tell ya, uh, uh, the base case I know is a man who's deceased, his name was Ludwig Jesselson, he was the representative of Phillips uh, the Dutch company that makes the radios and all that stuff. Um, and Ludwig used to come to the big gifts meeting every year, he was an incredible man, he built a gorgeous day school up in Riverdale called SAR, twelve hundred kids, I mean it's exquisite, overlooking the Hudson. The building is beautiful, the curriculum is marvelous. He uh, he was uh, chairman fo the board of Yeshiva University for a decade, uh he did all the right things. He was a German Jew, of orthodox belief and practice and you can't find a better type uh, because he was at the same time, a pluralist an da

generalist and he was as friendly with the reform as he was with his orthodox.

**Audience member:** He hired Yitz Greenberg to be the rabbi of Riverdale Jewish Center. Yitz was his rabbi, when-

**Herbert A. Friedman:** Yitz was Jesselson's rabbi, yeah right. Ludwig used to come to every uh, big gifts meeting at the very start, one of the people who would sit in those chairs in front of Mr. Rosenwald, and uh, [1:27:00] Ludwig says uh, okay, we - I'm answering your question - we will uh, uh, chip in two million bucks this year. Not - after, I didn't know what that meant at the beginning, but I found out very quickly. Ludwig's prin-policy was that he wanted every uh, corporate officer in his corporation, in the Philips corporation, to give a gif and he conducted a campaign inside the corporation to ensure that everybody contributed. And when that was all done and the forty or fifty top officials had put in what uh, whatever he could get from them and it came to x, the difference between x an the two million would be what he would put in. and it was more than all the rest of 'em put together, every year, every year, every year. [1:28:00] So there was a corporate share, and there was a personal share, and they were all announced as- as one gift.

**Cynthia:** Very difficult to do especially with a publicly held company. When you're asking to give to Jewish-

**Herbert A. Friedman:** This was a publicly held company.

**Cynthia:** Yeah, I mean but I think in today's world, if anyone's got any success with that, I'd like to hear about it.

**Herbert A. Friedman:** Well I don't know why it should take a public discussion 'cause it's always an individual case, Cynthia. It's always an-

**Cynthia:** No, I'd just like to hear a success story that somebody-

**Audience member:** Your question's a different question. Your question is, if you go to solicit somebody and that person says, I wanna let you know, um, we are doing our fair share, uh, our company has contributed this year to uh, to the federation or whatever it is, to the campaign, uh, four hundred thousand dollars. And that person has not written a personal check.

**Herbert A. Friedman:** So ask him.

**Audience member:** So that - her question really is, what do you say to that person when they [1:29:00] announced a large figure that wasn't given personally, how do you say to that person, yes, Mr. or Mrs. So-and-so, but I'm asking you -

Herbert A. Friedman: No! Not 'I'm asking you'! I assume that your gift is in that four hundred thousand dollars...

Audience member: No it's not.

Herbert A. Friedman: Well! Then he's gotta say something, doesn't he?

Audience member: Oh.

Herbert A. Friedman: Oh.

Audience member: Oh, I assume.

Herbert A. Friedman: I assume!

Audience member: But that would be an out 'cause he would say -

Herbert A. Friedman: You gotta smoke him out! With Ludwig you didn't have to smoke him out, he came publicly, eh said hey, Philips is gonna, uh, put in two million this year. And then he would go back to his office and uh, listen, everybody in town knew what the process was and every one of those thirty or forty division chiefs of his, some would get hit for ten thousand, some would get hit for forty thousand, y'know. He knew who was making which kind of dough and he was soliciting every one of those people in his corporation. And then, when it all-when when when that was all done and there was [1:30:00] eight hundred, nine hundred, a million in the pot, then he puts in his million 'cause he had made a public commitment of two million. So your

corporate chief in this instance makes a public commitment for four hundred thousand dollars from the company and if you don't know whether he's got his personal dough in there or not, you have to ask him. But the trick is to ask him not in a rude way, but in a clever way, and so are we to assume uh, uh, Mr.

Rosenbaum, that your gift is there? Well then, we'll send you your pledge card and uh, uh, you'll please return it to us.

**Audience member:** Got it.

**Herbert A. Friedman:** You smoke him out.

**Audience member:** And he says, no, my personal gift isn't there, my effort on behalf of charity is to see that my - a corporation which I'm the CEO of, or I'm etcetera, gives a fair share to uh-

**Herbert A. Friedman:** Yeah Mr. Rosenbaum, your responsibility is [1:31:00] absolutely to do that. But your responsibility is also to make your own gift and there's no avoiding it. And the man who was so poor as to live from charity, must himself give charity. T's clearly written in the Talmud. So that's - those the rules of the game, Mr. Rosenbaum and I-I-y'know, can't avoid 'em.

Okay. Um. The rating process, we went over that very carefully but the only thing I wanna say is that of the *minyan*,

of the ten guys who make the rating, your name as the leader has gotta be among, has gotta be in that *minyan*. 'Cause that gives that *minyan* strength and credibility, not just a bunch of strangers, it's you, the top uh, uh, person. You're in there. And uh, as many top guys as you can get [1:32:00]. Um, and by the way, rating meetings are lengthy because somebody said, we don't really have any data so one person around the table says, hey, rate that guy for ten thousand bucks and somebody else says, oh c'mon, you don't know how close to bankruptcy that guy is. And I don't wanna reveal any, any secrecy-any secrets here, but ten thousand dollars is way off the mark for him. Gotta ask him for two. Somebody else around the table says, are you kidding? I just went with this guy for a trip around the world on the QE2 and it costs forty-eight grand per person per cabin, what're you talking about bankruptcy? And back and forth it'll go around the table and pretty soon you're starting to spend ten minutes on each person.

**Audience member:** How does it dovetail into uh, the Jewish uh, *halakhic* [rule] about gossiping?

**Herbert A. Friedman:** It's not gossip! [1:33:00] I was on the boat with him! I didn't know what it costs! Facts, facts.



**Audience member:** [unclear] -y'know I saw his wife at the store and she bought a two thousand dollar dress, and-

**Herbert A. Friedman:** Well, that's gossip!

**Audience member:** Okay.

[audience laughs, commotion]

**Herbert A. Friedman:** No, where I was going was - [audience commotion] rating [bangs on table] rating meetings are very lengthy. But I'm telling you something, they're at the guts of the success of a campaign 'cause - just like you gotta have a goal for the whole campaign, you have to have a goal for each person that you're soliciting. And uh, therefore, when I say that you-you must have, you the chairman have to be there and you must have other heavy hitter name sin the community on that rating committee if at all possible, somebody's likely to come back [1:34:00] and say to you, hey listen, if I get on that rating committee and we got a hundred and twenty names to rate, everybody above uh, one thousand bucks we're gonna rate, uh, uh, I can't sit there for twelve hours. So then what you have to say is okay, come to one, come to two, so we can include your name in the *minyan* and uh, the other two uh, instead of being ten guys, there'll be nine guys at the table and you're absent. As - you have to be flexible and you have to compromise and you have

to try to include as many strong names as you can on the rating committee. But you, the chairman, have certainly gotta be there at all of them. Period. [Recording cuts out]

END OF AUDIO FILE [1:34:56]

**Audience member:** - for fundraising, now the true cost, the direct and indirect cost for fundraising are between nine and ten percent.

**Herbert A. Friedman:** Okay. There you are, you're on the very low side.

**Audience member:** I think it's also important to point out that the federation UJA overhead as compared to like, United Way, is phenomenally less and I -and I - [unclear] about that.

**Herbert A. Friedman:** Yeah well that's what - that what this whole thing boils down. Supposing his local cost in Portland to raise the dollar, not talking about the fundraising cost of producing the dollar of the contribution is ten percent. And the fundraising cost of the national UJA is thir-three percent. So to raise that dollar, it's costing thirteen percent, so eighty-

seven percent, eighty-seven cents out of every dollar goes to -  
is delivered to the beneficiary, either by the JDC or by the -

**Audience member:** You both were very specific that the nine or  
ten percent [1:00] is fundraising costs. What are you not  
including in that?

**Audience member:** I do not include for instance our community  
relations committee which is strictly a program.

**Audience member:** What about, but what about uh, what about rent-

**Audience member:** Yes, when I said it, direct and indirect cost,  
that's what I meant.

**Audience member:** I see, I see. So, in other words, eighty-seven  
cents on the dollar goes into projects and program.

**Herbert A. Friedman:** Correct. Now you talk about Red Cross-

**Audience member:** Oh, huge.

**Herbert A. Friedman:** You talk about United Way, you talk about  
March of Dimes or any fo the disease oriented stuff? Average,  
average, average is, runs around forty-percent.

**Audience member:** Why. Why do they spend so much money [**unclear**]

**Audience member:** [unclear] -more money from fewer people than any other charitable organization.

**Audience member:** Because of the lay leadership-

**Herbert A. Friedman:** Moshe, the answer to your question is very simple. The Jewish system works on the basis of [2:00] thousands of unpaid volunteers. And the professional fundraising system works on the basis of paid, highly paid or medium paid, doesn't matter, but paid workers. That's the whole difference in a nutshell and the number of volunteers that they have available to them according to the size of the population they're trying to cover, is ridiculously small. They have not succeeded in mobilizing hundreds of thousands of people to work you got a population of two hundred and fifty million people in this country! And you got a national Red Cross with a, with a reputation like that, you got a national United Way system, okay, so the last guy who ran it was a crook, so uh, uh, they get over that finally and hope the next guy won't be a crook. Uh, but they don't, they don't have access to the huge volume of volunteers. They should have- if we have in the federated uh fundraising system some thousands, no more than that, and if you wanna go, go call it some few tens of thousands, it's no more than that, then in relation to what we have, they should have

millions of volunteer workers. They haven't got it. So they have paid workers, and that's what jacks up uh, to that very overhead.

**Audience member:** So you're saying it's not because of corruption and tis not because of inefficiency, its simply because eth system works on a completely different structure.

**Herbert A. Friedman:** Yeah, correct. [audience commotion, laughs] All right, ladies and gents, we're through with this-

**Audience member:** I have, um, I have a question on something you - on number three on that same page, if you go back, [**unclear**] with those of your professionals.

**Herbert A. Friedman:** Where were you?

**Audience member:** Same page, twenty-four.

**Herbert A. Friedman:** Same page, twenty-four.

**Audience member:** Number three. Reconcile your ideas with those of your professionals.

**Herbert A. Friedman:** Yeah?

**Andy:** I wanna speak from the professional side for a moment. One of the things that I think rabbis, federation execs, headmasters

of schools, etcetera, um, uh uh, are frustrated by - good, I'm talking about good professionals - is that lay leadership changes uh, quite frequently and that the professionals expected to respect to the vision or goals of of each new president um, or or power broker, that is constantly changing. Now I'm not saying-

**Herbert A. Friedman**: Whoa whoa whoa. That is constantly changing? Every two years a new president comes in with a whole new agenda?

**Andy**: [continues] New ideas. I would, I would say this, that's there's a lot of - that's close to the truth. In other words, in a synagogue situation, you come in with, y'know, a president, and he is a traditionalist [5:00], we have to be more like the orthodox and and bahbahbahbahbahbahbah.. and so on. The next, the next president comes in and he's saying we've got to have a, we've got to really turn on the kids and do things like they do at Camp Ramah, let's get a guitar in here, etcetera, etcetera. And the next time somebody comes in and says, let's leave it all in the hands of the rabbi and the next president says, rabbi's a schmuck, let's get a - y'know, we have to, we lay leadership have to take over. And there is the profession- and I can give that kind of scenario in the federation for example. The

president of the federation of this year may be a person who's got two out of their three kids married gentiles, and therefore their thrust now, they take the whole task force on Jewish continuity, we've gotta reach out to the interfaith married then you have somebody else who came from south Africa who would die before they would let their kid be married to a non-Jew. So they say their [unclear] is we gotta think about everybody in Israel, and so on. And there's the professional who, who wants to be constant, who's got, y'know, who sees him or herself as the long range person in this [6:00] uh, uh, trying to respond in a healthy way, or ho- the question is, how does the professional respond in a healthy way to the, to the varying, um, agendas of different of different lay leaders?

**Herbert A. Friedman**: Well my answer to that would be very simple I think.

**Andy**: Without being inflexible and rigid.

**Herbert A. Friedman**: without... I would think, I would think that the, that the in-place professional who stay sin place as the permanent fixture, that's always, that's always better until that professional simply uh, goes stale and so then, you give 'em early retirement, whether it's the rabbi or the executive

director or who-it doesn't matter. But the-but work on the premise of what's hopefully more normal and more more healthy, the professional executive is in place for a long time, the lay leader you people, change periodically, you shift from one job to another, you keep moving up the ladder, um, the professional director - let me use the word 'should,' although that's not a good word 'cause that sounds like it's giving dictation. But I wanna use this- for the sake of grammatical shorthand. The executive director, the personal-the professional should have a set of items in his agenda of things which he or she consider valuable to do that would embrace about ninety percent of what any kind of changing lay leader would come up with. So therefore I don't see any conflict [8:00]. If you got ten items on your list that you real want to get done in your lifetime, you wanna reach a campaign of ten million bucks and you better do so and that's one of the items on your agenda, and you get a president who says, listen, the way to do it is thus and you think that that needs a little bit of tweaking because it's not quite a good idea, but you don't have to fight with him about it because all he wants to do is raise more dough also but the way that he's suggesting has got some flaws in it which you point out to him very gracefully and subtlety and elegantly and so you win



him over. What I'm saying is, I can't visualize a set of objectives that a person would wanna achieve in a lifetime, you wanna switch over you're your afternoon uh, supplementary school to a full day school connected with your synagogue. [9:00] Okay. You get a new president who says, no no no, what I wanna do is uh is increase the day school, is increase the-the supplementary school from two days a week to four days a week and I don't wanna hear all this nonsense about building a day school, it'll cost us ten million bucks. This is not inconsistent with what you wanna do because the best way to get an a-all time day school is to have a four day a week supplementary school and you're on the path towards what you want, so why the hell fight with him? Go along the two years with him, put in increasing from Tuesday and Wednesday to Monday, Tuesday, Wednesday, Thursday and uh, there's no real disagreement. He's- as a matter of fact helping it. Looks as though you guys have two different objectives but you slide 'em together, so what I'm saying in bottom line, the only time that you get into an irreconcilable and and unsolvable situation with your uh, uh, between the executive and the lay leader is when the lay leader wants to do something which is so outrageous - not only not appearing on your list, but seems to you to be so totally cockeyed as to be

against the Jewish interest - then, you gotta have, then you gotta have a fight with him and then the fight becomes, y'know, nasty bitter difficult or easy, some fights are easy, divorce. I've seen good divorces. And I've seen uh uh, divorces that struggle through courts for ten years. So that's my answer.

**Andy:** To the extent that you can get the organization whether it's the federation or the synagogue to actually have a written set of goals, it makes your job, if you're the person in the continuity position, a hell of a lot easier because then you can always point to those written goals and you gotta have the buy-in on the goals all-around, now you just start doing over how to get to the goals.

**Herbert A. Friedman:** Who's the 'them' to buy into the goals?

**Andy:** The changing, the changing lay leadership.

**Herbert A. Friedman:** This is only a tow man fight, symbolically. Maybe it's two, three-

**Andy:** Right, what I'm saying is the executive director, whether it's a federation or the uh, or the synagogue, can someh-can gently remind the lay leader that's coming in that yes, here's our-here's the long range plan that we set down, here are our

goals, and we're gonna be working together for the next two years, we're gonna have some differences of opinion, differences in how we get to them, but we have to remember these are the goals that we've set overall.

**Herbert A. Friedman**: Who's the 'we'?

**Andy**: The institution.

**Herbert A. Friedman**: No!

**Andy**: Well-

**Herbert A. Friedman**: Don't you submit it to a meeting of the, general meeting of four hundred people..?

**Andy**: No no no no no, if you're smart and you're the executive director, and you've made - and and and you're right, or you think you're right, um, then you've made your agenda, your goals, the goals of the institution.

**Herbert A. Friedman**: That's it. I have no objection and if they're written down, and then the executive professional and the lay leader have copies of it in their pocket and the executive director's is getting frayed now because it's been in his pocket for about twenty years, or the rabbi, and he has to whip it out and show it to each new president, that's okay, and

make a clean Xerox copy for the president and the two of these guys have got it in their pocket and that becomes the rules of the- the rules of engagement between the two.

**Andy:** Yeah but you've gotta you've gotta admit that there's, there's quite a bit of legitimacy that's added to it if through some process whether it's long drawn out and painful or hopefully short and sweet and according to your rules that you get your goals and objectives to be the written formal goals and objectives [13:00] 'cause once it's written down and agreed to, then it it it takes a lot to change it.

**Herbert A. Friedman:** Dear boy, you are uh, you express the opinion of the vast majority of the people in the system. Who believe in process and who believe in submitting things for general widespread approval if you can get it, I find that all terribly dangerous and time-consuming, that's my main beef about it. I don't- I'm not against uh, uh, uh, democracy for God's sake, but all I am against is the incredible substitution of the process methodology for the decision making methodology.

**Andy:** Now Herb, you-you read me wrong because I've been through the long, drawn-out process and indeed it is painful, all I'm saying is there is a validity for somehow [14:00] hopefully

short and sweet, for getting - getting your agenda, or getting the agenda agreed as the overall goals for the institution.

**Herbert A. Friedman**: Well have you, have you- really experienced a short and sweet?

**Andy**: No.

**Herbert A. Friedman**: [laughs] Dear Andy, it doesn't happen! It doesn't happen.

**Andy**: You don't get the short and sweet 'cause you get a ten or a twenty percent long-range planning committee and as soon as you have that many people on the committee, you know nothing's ever gonna get done.

**Herbert A. Friedman**: You're dead in the water.

**Audience member**: But don't you need a foundation? The rabbis are asking for a structure which it can [**unclear**], I sit on a, I chair a medical committee. We have a mission statement, we have objectives, we have a committee that changes it every year. But the fundamental uh-

**Herbert A. Friedman**: That changes the mission statement?

**Audience member:** Not the miss- well, sometimes we'll alter it, depending on circumstances, but you know, fundamental structure so you don't get a new president who totally throws it out and writes his own. I mean, it's the institution, not the individual, [15:00] we get [**unclear**] foundation it.

**Herbert A. Friedman:** I forget who sa-I forget who said this sentence uh, I-I just, his name slips my mind, an institution is the lengthening shadow of a man. An institution is the lengthened shadow of a man. How many people were sitting in Philadelphia in the summer of 1776? Forty-four. Forty-four people sat there and they sat there for three months. And they produced a document which is your mission statement and your rules of procedure and, thank God, it's more than two hundred years later, and this is now the oldest system of government on the face of this planet. The English monarchy is not a system [16:00] of government, all that the queen can do is put on the tiara, come to the parliament, and make her speech and uh, she can't submit legislation, pass legislation, she can't decide a damn thing, nothing. It's a beautiful gorgeous formality with ermine and mink and uh, lots of medals and badges and I love the pageantry of it, we just - we were in London recently and saw her birthday, she was born in February but she picks a date in

June, which is called the Queen's Birthday, because the weather's better, they can have all the parades outside, it was exquisite! And one thousand and forty people were announced in the newspaper as the recipients of OBEs and CBEs and all of that, and um, the government of the United States functions as the oldest continuous government in- in- on earth. [17:00] now forty-four guys getting together for three months is fine if that'll decide something for the next two hundred years, and you have a court that interprets- somebody disagrees, agrees with it, what is the, what is the first amendment mean, what does the tenth amendment mean. Um, look. If if if you have to change the rules of operation in one form or another every year, that sounds chaotic to me. At any rate, at any rate, a-a-try to obtain a larger consensus if you can, I'm not against it, but depends on what the cost is. And if the cost is lots of meetings of small group of people, endlessly, endlessly, endlessly, endlessly, for two years that committee on continuity has produced [18:00] zilch. Zero. And they've met faithfully for two years. The um, the the bringing of-of of, arguments to a general meeting of the whole board, of the whole membership, you call an annual meeting of the membership of the federation to elect officers and you've got four hundred peo-you're lucky enough o

have four hundred people in the room, you can't submit anything controversial to a group that large so then they'll appoint a committee and then-that committee will, will *plotz* around with it, and uh, it's a- it's a horrible delay of decision-making. Short and sweet I could live with, no problem. So Andy if you ever can figure out how to do that, then I'm with you. Uh,uh.

**Andy:** I'll let you know in about two years, I'm working on it.

**Herbert A. Friedman:** [laughs] [19:00] Okay, good, keep going. Anybody else have anything that they would like to say uh, before we conclude? I wanna put uh, or I won't bother to write 'em on the board, let me read them and and this is what, you can write them down quickly. This is the summation of the whole business, folks. There- there are, point one. The leader's role is to institute change. Number two, this requires - and that's all there is, there's only a number one and two - so number two, this requires colon: A, having a new vision [20:00] B, creating a plan to achieve it, [audience member clears throat] C, communicating that vision and plan and number four, acquiring a following. That's it, now all the rest is commentary.

[audience commotion]



**Herbert A. Friedman**: We've been through, we've analyzed, we've questioned every single person in this room has spoken. Every single person in this room has spoken and contributed to this discussion, and I think it's been wonderful. Um -

[audience applause, 21:19 to 21:25]

**Herbert A. Friedman**: I wanna thank you for listening and I wish you good luck, and we have five minutes left.

**Audience member**: Did we have a choice in listening? I just wanna know.

**Herbert A. Friedman**: [laughs] Larry?

**Larry**: The reaction on, I'm just, on lay-leaders, um, should the organization have a fix term or should [unclear] if they're so elected number one, and if there is no fixed term, what's your own just general sense of one person in a lay leadership position who's been there long enough, like president of an organization?

**Herbert A. Friedman**: Let me take the second first, because that's what's mostly the case. There are very few cases where uh, there are no term limits. My - my experience has been- let me give you the negative first. I hate the business of annual

change, I think a person who serves in office for one year is a dummy, a robot. He - one year's not long enough to learn a damn thing. Can't learn the culture of the organization, its history, why things were done in the past which you're living with in the present, can't learn the personnel around you, you can't learn your fellow lay-leaders, you can't learn the intricacies of the deep relationship you need with the executive director. I mean, one year's nothing! One year, you just caught your breath. So I'm against those what I think are superficial efforts [23:00] to try to satisfy as many egos in town to-to- revolve the presidency around a larger number of people that [unclear] I think that's not a legitimate reason. I really don't. so having said the negative, I think that the term of a president and a campaign chairman sho- I think they should stay in office each of them, it's two separate people, for four years. Four years is a term that uh, that isn't - that I don't choose arbitrarily. I mean, the term of a president is four years um, and if two people are in office for [24:00] four years, parallel and simultaneous, then - and and there's a good marriage, boy the institution's gonna flourish. Now, uhm, the executive director can stay there as far as I'm concerned, for life so long as he is a productive, creative, flexible, able to adjust to new

president every four years. The campaign chairman should revolve upward, in my opinion, of these three people - remember I said these are the three most important people - the campaign chairman might say, uhm, I can't stay in office for four years, it's too hard. So you have to make it easier for him by somewhere- or her - every time I say 'him,' it's a 'you guys' [25:00], the women are guys. The uhm, the the - to make it easier, you can make, you can have a chairman designate or deputy chairman, whatever you wanna call him in line appoint him officially by the second year of the chairman's uh, uh, uh, term so that everybody knows that this is the next guy to be the chairman and the chairman has a deputy for two years who can help and on whom he can offload a lot of the tough stuff, because I do believe in delegation. So begin from the bottom. Elect a chairman and say to him, we'd like you to serve four years but we're gonna get you a deputy chairman at the end of the second year, and at the end of the second year, you have [26:00] to get the deputy chairman. Fix somebody as the president for four years, at the end of the fourth year, if you're lucky enough that your chairman stays through for four years make him-move him up to the presidency so then you get eight years of work from that person. Or you get six year's work

from that person. What I'm driving at is longer terms of service than are normally prevalent in the federation system, where I think the terms of service are too short and therefore I think it's like a revolving door, they're in and out too soon. Now beyond that, uh, uh, membership on the board, I don't care about that. Um, you can say, board terms are two years, renewable once, so [27:00] that gives them a four year thing and then out. And if you need to have a vehicle by which you can keep revolving more people in and out, it's the board. And if the board gets too big, then chop down the items which are brought to the board attention by creating an executive committee that's much smaller, five, six, seven, eight, ten people max. eight is the best number, seven is better 'cause then you get a tie vote - uh, you don't get a tie vote. Four to three, which if it's legitimate for the Supreme Court oughta be legitimate for the federation of uh, San Diego. Um, and and most of the decision making then takes place inside the executive committee of seven uh, and you have a board of fifty or sixty uh, and that's rubber-stamp. [28:00] And that's- those are the terms that I would think of the structure. What I have left undetermined is the nature of this executive committee and what this executive committee has to consist of are the people with the longest

terms of service which means the greatest experience. Unless they've reached a point of Alzheimer's, then - that - but if a guy has been your chairman for four years and been your president for four years, and he's had eight years and then you slide him over to your executive committee, [unclear] you should only have six or seven people who each has uh, uh, eight or nine-eight years of experience, then you've got an executive committee which has only one problem to it. It's getting too old. [29:00] A- in a chronologically, and that means it's getting frozen brains. That's what happens, they get so fixed in their ways, that's the risk, that's what you have to watch out for carefully. So then you have to prune just prune that executive committee carefully. If you sense that there are one or two guys that just become so rigid and so fixed they can't comprehend any new ideas-

**Audience member:** You prune the prunes, huh?

**Herbert A. Friedman:** Sir?

**Audience member:** You prune the prunes.

**Herbert A. Friedman:** [laughs] Right. Now I dunno, that's just me, but there's no, there's no fixed set of rules, Larry. It's what works best.

**Audience member:** I know there's no time for an answer, just wanna throw out the question anyway. Leadership, leaders, the leader's role is to institute change. What changes would you like to see in the Heritage Wexner Fou- Wexner Heritage Foundation?

**Herbert A. Friedman:** [laughs] He gives me a question- [30:00]

**Audience member:** Why don't we just have lunch brought in?

**Herbert A. Friedman:** Yeah, oh, gives me a question and says - begins - there's no time to answer. Yeah.

**Audience member:** [unclear] would've loved to hear the answer.

**Herbert A. Friedman:** [laughs] Look the only thing I can I tell you is this, I have an appointment this afternoon- Nathan and I are going this afternoon to see Mr. Wexner at four thirty, you guys'll be out there by about six thirty. Uh, this is not changed, but we have a crossroads decision to make um, we have reached almost the end of one cycle I the united states. San Francisco is coming in on Friday when you go out, for their basic Judaism five days. Uhm, and that's mostly devoted to God, Israel, Torah. Theology stuff like that. Um.

**Audience member:** So that's the end of the cycle.

**Herbert A. Friedman**: San Francisco's city number twenty-six, and we're playing around with [31:00] uh, Los Angeles to be if, ninety-seven, and I got a lot of doubts about it, but uh, Nathan really wants to do it so okay, he's the boss and I'm the emeritus so we're gonna do it. Uh, so that'll be city number twenty-seven and that will be one *machzor* [cycle] of the United States of America. We left out a lot of cities, I mean, we did Houston and I skipped Dallas because Dallas was in a state of total disarray internally, locally. Uh, we did- we did Columbus and I skipped Cincinnati, it was changing executive directors, I don't know, every fifteen minutes it seems to me. Uh, it's now straightened out, it's be- [recording cuts out]

[Recording cuts out 31:44 to 31:51]

**Herbert A. Friedman**: Round two in the United States, absolutely doable. Because it would be thirteen years later that we come back to [unclear] and uh, there bu-there're a whole new bunch of thirty-five year olds thirteen years later, aren't there? Certainly, so we could do it again in Pittsburgh. What I call round two. Go back over the twenty-seven cities. Uhm. Second alternative uh, there's a lot of, uh, requests coming from Canada. There are only four cities there, there's Montreal and Toronto and Calgary and Vancouver, uh, Quebec's outta the game

because uh, of the whole French-Quebecoise uh, y'know, separatism and all that. So [unclear] should we take on the four cities in, in Canada, it's a legitimate request, a big important population's up there, they got the same problems of leadership difficulty for the future. Thirdly, there's um, the FSU. [33:00] You got a hundred and fifty thousand Jews living in Saint Petersburg, that's more than you got in San Diego, and we spend time, money, and energy in San Diego - why not in Saint Petersburg where there's nothing? There's no infrastructure even, there's no synagogue, there's no school, everything is arbitrary, it's only in the last few years the Joint came in, Chabad came in, they're all trying to do something good. Good, good will. But uh, there's nothing systematic, there is no core of leaders. So it's an absolutely legitimate thing to go into Saint Petersburg and try to find together the thirty, forty people who are willing to sit down and learn their Judaism. And then learn how to build a community around it. It's not from the bottom-up, it's from the top-down. Uh, and there are uh, six, seven, eight major places in the, uh, in uh, the FSU that can use this. And then the best - saving the best for last - is to take the program to Israel. [34:00] Because he has mad e- we made a probe there in '92 and we made another probe there in



'93, um, as to whether the atmosphere would be acceptable and uh, boy oh boy, we got uh, [bangs on table] y'know, like this vote here for the Prime Minister was such a squeaky thing by - never mind Chaim Sharket's figures, one percent of the people elected Mr. uh, Mr. Netanyahu. Um, we got people who said, what are you talking about, you're gonna come and you're gonna teach us uh, you gonna try to teach us Judaism? You gonna teach us the history of the Jewish people? Or...uh, all the things you get in the two years. What are you talking about? We're Israelis! So I say, yeah well, that's the-that's the problem, Israelis used to be called Canaanites, now you guys wanna be Canaanites? I mean there is such a thing as the Jewish religion, eighty percent of you don't wanna practice t. well that ain't real-that ain't very good, is it? Um, and so they uh, y'know, so then that element - we interviewed, long interviews with seventy-three people, we have the written record of those interviews. So I'm not just guessing, I'm not making stuff up. Um, fine, you gotta go, go, goodbye! This is- this is free time. And I'm through - um, we would like to have-

**Audience member**: You interviewed seventy-three people.

**Herbert A. Friedman**: And and half of them said, we would like to have- we would like to have, we heard all about this thing in

Ameri- these were forty year old people, your contemporaries, rich businessmen, academicians, doctors, lawyers, army people, we went through the whole Colonel level, the future generals. Um, they said, well, y'know what we don't have? [bangs table] We don't have any understanding of what democracy is, teach us democracy, political democracy, give us a course for a year in political democracy. So I'm thinking to myself why- maybe, why not? And then the second year we'll sneak in some Bibles... [audience laughs] Um, the other half of 'em said please come, come come come, we're developing a country full of *goyim* [non-Jews], everybody is merging, it's - Algerians and Yemenites are meeting Freshmen and Norwegians, this, we gotta, we got the tower of Babel here, pretty soon everybody's speaking Hebrew, um, but um, but we really have such a split [37:00] between religious and secular in this country that we - we need Judaism, okay. So please come. Well, you gotta split deal like that and after '93, when I told - when we presented this stuff to Leslie, he said, go west of the Mississippi, we were out only as far as St Louis then, I think. He said go out, finish up the united states first, and we'll talk about it again. So this afternoon, we're gonna talk about it again. So I don't know whether we should go do round two, whether we should do Canada, whether we

should do the FSU, or whether we should do Israel. See, I would love to vote to do Israel and -

**Audience member**: You're-you're looking to select one, not all of the above, obviously.

**Herbert A. Friedman**: Can't do all of the above simultaneously. I mean, if all of the above ha-should be done, then we're talking about the next twenty years' worth of work. The question is, what do we do now, in the immediate future. So that's [38:00] the only answer I can give you right now.

**Audience member**: The principle of Wexner is to train, is not to do the job, but to train people who will be able to do the job.

**Herbert A. Friedman**: That's correct.

**Audience member**: So the answer is, number four: Doing Israel is training people who ultimately will do the job in the FSU, Canada, and the United States.

**Herbert A. Friedman**: Yeah, yeah. So I don't know how it's gonna come out.

[audience commotion, background conversation 38:25 to 41:11]