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THE JEWISH AGENCY FOR ISRAEL
INSTITUTE FOR LEADERSHIP DEVELOPMENT
הסוכנות היהודית לישראל
המכון לפיתוח מנהיגות

July 8, 1975

Rabbi Herbert Friedman
15 Iben Gvirol St.
Villa Section
Caesarea

Dear Rabbi Friedman:

Thank you for agreeing to meet with this year's group of fundraising professionals on Tuesday, July 15 from 10:30 - 12:30 for a "brainstorming" question and answer session. Al Gilens was absolutely delighted and we at the Institute are all looking forward to a very exciting session.

Eve Weiss, my former boss, and Howard Stone had told me I just had to hear you speak. I very much enjoyed today's phone conversation and am so glad I will finally have the opportunity to meet you in person.

I have enclosed a copy of Al's fundraising seminar schedule and brief "bios" on each of the participants. I do hope you find this information helpful.

Regards from Shaham, Aloni and Al.

Cordially

Rosalie Yarmus-Lurie



THE JEWISH AGENCY FOR ISRAEL
INSTITUTE FOR LEADERSHIP DEVELOPMENT
הסוכנות היהודית לישראל
המכון לפיתוח מנהיגות

FOURTH COURSE FOR PROFESSIONAL FUNDRAISERS

June 20 - July 29, 1975

List of Participants

1. Mr. David Agronin
2. Ms. Lea Beirach
3. Ms. Nurit Brier
4. Mr. Moshe Cysner
5. Mr. Norman Fishman
6. Ms. Judith Frede
7. Mr. Eric Heffler
8. Mr. ^{Melvin}~~Ephraim~~ Lichtman
9. Mr. William Lipper
10. Mr. Sandy Klein
11. Mr. Ira Mogitz
12. Ms. Sue Neuman
13. Mr. Leonard Rand and wife
14. Mr. Solomon Rybak
15. Ms. Diane Waxer

DAVID AGRONIN, 24, presently a National Field Representative of the United Jewish Appeal, was a group leader of a summer institute in Israel in 1973. A graduate of Queen College, New York, in chemistry, with some graduate courses in economics and accounting, David has held leadership positions in Jewish communal organizations and was college campus representative to the Zionist Youth Foundation. He has published articles in NY Jewish student publications and writes for HaOr.

LEA BEIRACH, 26, is a graduate of Tel Aviv University in Arts and Communication. Born in Israel, Lea has worked as a T.V. Director at the Instructional TV Center in Ramat Aviv. Her special interest is in education as it relates to public affairs and Jewish History.

NURITH BRIER, 34, has been a TV and radio reporter for the Israeli Broadcasting Authority, for the past 5 years where she was responsible for the research and production of documentary TV items as well as interviewing, writing and recording commentary. A graduate of Hebrew University in English Literature and the social sciences, she has also worked as a liaison's officer of the public relations dept. of the Jewish Agency, responsible for maintaining contacts with "non-Jewish" Israel supporting friendship associations in Europe and America.

A member of the Israel Press Association. Nurith's field is journalism, with a special interest in social affairs.

MOSHE CYSNER, 26, is presently a fundraiser in the "trade and professions" division of New York City United Jewish Appeal - Federation of Jewish Philanthropies. Born in Israel, Moshe is a graduate of City College in NY with a major in psychology. A youth leader, organizer and educator in the Hashomer Hatzair Zionist Youth Organization, his special interests are political and Middle Eastern affairs.

AMERICAN JEWISH ARCHIVES

NORMAN FISHMAN, 32, is presently a fundraiser for the United Jewish Welfare Fund in Los Angeles. A native of Minneapolis, Minnesota, Norman received his Associate Arts degree from the University of Minnesota. After working in direct sales in Los Angeles for several years, he became Associate Director of the American Technion Society. He is married and has 1 child.

JUDITH FREDE, 36, is presently a fundraiser in the "Trades" division of the Combined Jewish Philanthropies of Boston, Mass. A graduate of Emerson College in the field of English Literature, Judith first worked as a fundraiser in the "Trades" division of the Federation of Jewish Philanthropies in New York City.

EPHRAIM LICHTMAN, 49, a National Field Representative of the United Jewish Appeal, is presently responsible for UJA fundraising activities in Bergen County, New Jersey. A native New Yorker and graduate of City College NY in accounting, Ephraim has worked as the Administrative Assistant at the Jewish Federation of Essex County and as Office Services Manager for the NY office of the American Friends of the Hebrew University. His main interests are administration, politics, history and sports. He is married and has 2 children.

WILLIAM LIPPER, 33, a native Californian, is presently a National Field Representative of the United Jewish Appeal, responsible for campaign in both federated and non-federated communities in the Northwestern United States. A graduate of Brandies University in economics, he received a Master's of Science from Boston University in Cinematography. Before joining the UJA staff, Bill worked as a independent movie producer in Los Angeles, writing, producing and directing both educational and feature films.

IRA MOGITZ, 31, a native New Yorker, is presently a Campaign Associate of the Greater Miami Jewish Federation, responsible for fundraising activities in the "Trades, Hi-Rise and Professions". A graduate of Long Island Univ. with a Master's in Guidance and a B.A. in Business Administration from Pace College, Ira also attended the New School for Social Research where he studied professional fundraising management. A member of the National Association of Fundraising, the American Marketing Association, the Queens Mineral Society and Temple Beth Am, Ira first worked in the FR field as Assistant to the Director of Special Gifts at the United Jewish Appeal of Greater New York.

SOLOMON RYBAK, 31, a native New Yorker, is presently a fundraiser for the New York United Jewish Appeal and Federation Joint Campaign in various Brooklyn communities. A graduate of the Netzach Israel Rabbinical Seminary in Judaic Law and Philosophy, he is a Ph.D. candidate in philosophy at the City University of New York. Sol is married and has 2 children.

DIANE WAXER, 25, is currently the Director of both the Leadership Development Committee and the Young Adults Division of the San Francisco Jewish Welfare Federation.

ERIC HEFFLER, 23, is presently Asst. Regional Director of the Southwest. Eric lived on a kibbutz for a year and holds a BA in MidEast studies.

SANDY KLEIN, 33, a native Palm Beach, ^{is} presently a field representative for National UJA. Formerly self-employed in the field of sales, Sandy holds a BA in Business Administration. He has done fundraising as a layperson for Israel Bonds, a Day School in Palm Beach and for the Special Olympics of ~~Hosida~~ Florida.

SUSAN NEUMAN, 24, is presently Executive Director of the New Britain Jewish Federation and a Staff Associate of the Hartford Jewish Federation. She holds a masters of social work and community organization. Sue spent her Junior year of college in Israel and comes from an observant Jewish background.

LEONARD RAND (RANDY), 63, is presently Executive Director of the Hawaii Jewish Welfare Fund in Honolulu. After serving as military prosecutor in the War crimes trials in Japan, Randy continued to work in Tokyo for 23 years as a US Government civilian employee.

FUNDRAISING COMMITTEE OF THE RECONSTITUTED

JEWISH AGENCY

MEMORANDUM

1. ASSESSMENT OF CAMPAIGNS

- A. The UJA and the Keren Hayesod will place basic information at the disposal of the Committee concerning those communities in the U.S.A. and other countries which raise, or can potentially raise, at least \$ 1 million annually.
- B. This will include the following data:
- (i) Jewish population;
 - (ii) General per capita income of the various countries and such economic facts on the Jewish community as are available;
 - (iii) Campaign results each year since 1966;
 - (iv) Number of contributors each year since 1966;
 - (v) A break-down of the levels of giving, stating the number of contributors and the amount contributed in each bracket;
 - (vi) Goals accepted by the various communities for the 1971 Campaign, indicating how and when accepted;
 - (vii) Total of pledges and cash inflow of each country in 1970 and 1971;
 - (viii) Basic facts on Campaign organisation and methods current in each country.

2. RECIPROCAL EXCHANGE OF REPRESENTATION AT CONFERENCES

- A. Selected leaders of various countries will be invited to the CJFET General Assembly and the U.J.A. National Conference and selected North American leaders will be invited to Keren Hayesod Regional and International Conferences.
- B. This procedure would facilitate an exchange of ideas on:
- (i) Methods of fundraising and organisational procedures which have been proven in the field.
 - (ii) Publicity and public relations materials which have proved effective.
 - (iii) Individuals who may be of help in obtaining contributions in particular trades or industries or generally.

3. WORLD LAY LEADERSHIP SEMINARS IN ISRAEL

- A. It is suggested that seminars for lay leadership of the U.S.A. and other countries be arranged in Israel related to a study in depth of the needs of Israel and how to meet those needs as well as a forum for an exchange of information on campaign methods and experience.
- B. These seminars could be organised as an independent operation or be coordinated with the Leadership Study Missions organised by the U.J.A. and Keren Hayesod from time to time.

- C. Such seminars could be followed by sub-missions to various parts of the world with JDC and related organisations.

4. TRAINING FOR PROFESSIONALS

- A. It is proposed that a Training Institute for Professionals be established in Jerusalem whose function it will be:
- (i) to train candidates for the posts of campaign directors;
 - (ii) to provide refresher courses for those already serving as campaign directors.
- B. It is envisaged that courses will be conducted in Hebrew for already serving or newly-appointed Israeli personnel, and in English for already serving or newly-appointed personnel from other countries.
- C. It is suggested that the 2 to 3 month course be based, inter alia, on the following curriculum:
- (i) ORIENTATION TO THE ISRAELI AND JEWISH SCENE
 - Outline of Jewish History, Customs and Traditions
 - The Jewish Agency - its Constitution, powers and relationship to the Government of Israel.
 - A study in depth of the responsibilities of the Jewish Agency (Immigration and Absorption, Education, Higher Education, Agricultural settlement, Social services, etc.).
 - General survey of the political, military and economic factors in Israel today.
 - The relationship between the financial arms of the Jewish Agency and other Israeli fundraising organisations operating abroad.
 - (ii) THE MECHANICS OF CAMPAIGNING
 - Campaign framework: Involvement of workers; National, regional, local committees; Group dynamics (business, trade, professional and other committees); Young leadership; Women's Division; Press, publicity, public relations.
 - Principles of successful campaigning: Pace-setting; Study Missions; National, regional, local and inter-regional Study Days; Office organisation and administration; Head Office services and two-way liaison between Head Office and field staff.
 - (iii) THE WORLD-WIDE CAMPAIGN ORGANISATION
 - The U.S.A.
 - The rest of the world

ZELIG S. CHINITZ

S. J. KESUTNER

FUNDRAISING SEMINAR

Alvin Gilens

Sunday July 6	9:00 a.m.-	- What is a Fundraiser?
	1:00 p.m.	- World Jewish Fundraising - Overview - The Organized American Jewish Community -- How and Why?
(Hotel)	3:00 p.m.- 4:30	- Further Study of Community Structure for Israelis and UJA Field Representatives
<hr/>		
Monday July 7	8:00 a.m.-	- The Fundraising Campaign within the Community
	1:00 p.m.	Structure - The Role of Leadership - The Role of Community Professional - The Role of the National Fundraiser
(Hotel)	2:30 p.m.- 4:30	- Discussion with Israelis and UJA Field Representatives
<hr/>		
Tuesday July 8	9:00 a.m.	- Pre-campaign Planning
	1:00 p.m.	- Organization - Calendar
(JA Meeting Room)	2:30 p.m.- 4:30	<u>Entire Class:</u> Solicitation -- The Background
(Hotel)	8:00 p.m.-	-Orientation for Development Towns.... Harry Rosen
<hr/>		
Wednesday July 9	Visit Gaza Strip..... Ze'ev Shaham	
	evening:	- Film: "Threshold in the Desert" - Meet with the Mayor of Beersheba
	overnight:	"Neot Hamidbar" Hotel, Beersheba

Thursday
July 10

A Study of Dimona, a Development Town

Friday 8:00 a.m.- - Pre-campaign Planning (continued)
July 11 12:00 - Programs

Ziva Ben Reuven

(Hotel) 2:00 p.m. Entire Class: Operation Upgrade
4:00

Saturday
July 12

Free day

Sunday 9:00 a.m.- - Volunteers -- The Critical Ingredient

July 13 1:00 p.m. - Relationshipsguest lay leader
- Recruitment *Don Gould & wife*
- Training *(Sheriff)*

(Hotel) 7:30 p.m.- - Solicitation Training
10:00

Monday 8:00 a.m.- - Campaign Methodology

July 14 1:00 p.m. - Preparation -- Rating, Assignment

(JA Meeting Room) 2:30 p.m.- Entire Class: Crutches and Slings -- Campaign
4:30 Support Services
- Administration
- Public Relations

(Hotel) 7:30 p.m.- - Solicitation Training
10:00

Tuesday 8:00 a.m.- - Campaign Methodology (continued)
 July 15 ~~10:00~~
~~1:00 p.m.~~ - Obtaining the Contribution -- Soliciting,
 10:30-12:30 Meetings Questions & Answers - Herbert
 Friedman
 (Hotel) 2:30 p.m.- - ~~Discussion with Israelis and UJA Field~~
 4:30 ~~Representatives~~ Campaign Methodology - cont
 meetings
 (Hotel) 7:30 p.m.- - Telephone Solicitation
 10:00

Wednesday 8:00 a.m.- - Special Divisionspresentation by
 July 16 1:00 p.m. WD lay leader
 - Cleaning and Closing the Campaign
 (JA Meeting 2:30 p.m.- ~~Entire Class: Securing the Big Gift~~
 Room) 4:30

Thursday 8:00 a.m.- - The Fine Art of Solicitation
 July 17 1:00 p.m. - Between Four Eyes
 - Away From Home..... Ziva Ben Reuven
 - With Help
 - Getting the Opportunity
 (Hotel) 2:30 p.m.- - Solicitation Training Jan Saltzman
 5:00

Friday 8:00 a.m.- - Leadership Development
 July 18 1:00 p.m. - Cash Collection
 Lunch: Hotel Hilton
 p.m. Review and Evaluation

Practical suggestions for work of Fund-raising Committee

~~to Campaign seminar in November~~

1. ~~Try to~~ ^{a scheme for extending} work out ^a invitations ~~to~~ ^{to} selected non-Americans to join American Oct Study Mission - to witness and learn from soliciting methods. This means explaining to K.H. the advantages of such a scheme; and persuading the UJA to accept it. Expand this eventually to Y.L., W.D., Students.
2. Organize ^{two-day} ~~a~~ Campaign Seminar in Europe in ^{mid-} November for top lay leadership (to which UJA should send ^{at least} 5 men; ~~and~~ European countries as ~~many~~ they desire; Latin America as many as they can) on ^{three} ~~two~~ subjects: the "line" for 1972; ~~and~~ campaign techniques; publicity materials available - everyone to chip in his stuff.)
3. Organize two-day campaign seminar in Israel in mid-December for all professionals in world (from US - a mixed delegation of UJA, ISFED + community exec. dir.) on campaign techniques, for 1972
4. Develop a pool of names of lay leaders who can solicit and/or speak across national frontiers, during 1972 campaign
5. ~~Develop~~ Develop larger pool of Israelis who can go abroad as speakers.

MEMORANDUM

Date February 25, 1971

To Philip Bernstein

From Irving Bernstein

Subject Proposals of Fundraising Committee

As we discussed in Jerusalem, I would not try to encompass too much in the beginning. Therefore, I would suggest we concentrate in three areas: a. Communication, b. Volunteer Leadership, c. Professional leadership. Therefore, I would suggest the committee concern itself with the following specifics.

I Communication

- a. System of regular exchange of information giving every country the status of progress of campaigns in other countries.
- b. Meeting in Jerusalem in August of selected international leaders to begin planning the goal for the following year.
- c. The selection of publicity and public relations materials which are considered to be original and effective, to be made available to all campaigns.
- d. The exchange of original and productive new programs so that all campaigns can benefit from creative efforts in other countries.
- e. The development of a list of individuals who are good speakers to serve as a speakers bank for all campaigns.
- f. Telex network set up so that an immediate need in our area can be immediately transmitted to all other areas.
- e. Immediate notification to all areas of travels of top international personalities.

II Volunteer Leadership

- a. Selected international leaders to be invited to the CJFWF General Assembly and UJA National Conference for consultations, briefing and training.
- b. Selected American leaders to be invited to Keren Hayesod international meetings in Europe and South America.
- c. Campaign seminar for country chairmen to be held annually in either New York, Geneva or Jerusalem in November. Seminars to be divided

equally between interpretation of needs and how to meet the needs.

- d. Special seminars on each continent with small groups of international leaders, approximately 30 to a group, in order to help develop better leadership and hold clinical meetings on campaign problems. In America, for example, such meetings could be held in Onchiota, Arden House or Harrison House.
- e. Invitation by UJA to selected international leaders to join all UJA missions in Israel: Annual Study Mission, Women's Division Mission, Young Leadership Missions and Operation Israel Missions.
- f. Invitation by Keren Hayesod to Americans to join whatever missions they are holding in Israel.
- g. Sub-missions to various parts of the JDC world by selected groups of international leaders.

III Professional Leadership

- a. Resident program of the UJA and CJFWF for foreign professionals in order to provide training over extended period.
- b. Visits by American professionals to selected parts of the Keren Hayesod world where there is especially good campaigning, for example, Antwerp diamond industry.
- c. Annual retreat at a place such as Onchiota for selected professionals throughout the world involved in campaigning.
- d. Annual retreat in Jerusalem for similar group.
- e. Invitation to selected professionals throughout the world to join special fundraising missions in Israel of both the UJA and Keren Hayesod.

PROPOSALS OF FUND RAISING COMMITTEE

The purpose of the Committee on Fund Raising of the Jewish Agency will be to assure maximum income for the Agency year after year. The Committee should include the chairmen of the Keren Hayesod and United Jewish Appeal and their professional executives, and foremost campaign leaders of other countries. It will have to take due account of the autonomy of the organizations involved, and of what will be most productive in view of the differences among the countries, and of the geographic distances and the time pressures on the people involved.

Its work might well be addressed to the following elements:

1. Goals and Quotas of Countries

Consultation with leaders of various countries aimed at goals and campaigns in each country consistent with their respective potentials. This should take into account:

- a) Campaign results each year since 1966.
- b) Numbers of givers each year since 1966.
- c) Jewish population.
- d) Whatever pertinent economic facts on the Jewish community are available.
- e) Levels of giving -- numbers and amounts of gifts in each bracket.
- f) How the funds are raised - basic facts on campaign organization and methods.

The initial meeting to undertake the goal setting process can be held in Jerusalem in June or August.

2. Continuing Communication among Countries

This can be done centrally through the Keren Hayesod office in Jerusalem, and often in some respects directly country to country. It should include:

- a) System of regular exchange of information giving each country the status of progress of campaigns in other countries.
- b) The exchange of original and productive new strategies, organization, methods - so that all campaigns can benefit from creative efforts in other countries.
- c) The selection of the best publicity and public relations materials which are considered to be original and effective, to be made available to all campaigns.
- d) The development of a list of individuals who are good speakers to serve as a speakers bank for other campaigns -- with recognition of the practical limitations on availability, travel, etc.
- e) The development of a list of individuals who might help in obtaining gifts in particular trades or industries, or generally.
- f) Immediate notification to other areas of travels of top international personalities.
- g) Telex network set up so that an immediate need in one area can be transmitted to other areas.

3. Volunteer Leadership

- a) Selected leaders of various countries to be invited to the CJFWF General Assembly and UJA National Conference.
- b) Selected North American leaders to be invited to Keren Hayesod meetings in Europe, South America, etc.
- c) Campaign seminar for country campaign chairmen to be held annually in New York, Geneva or Jerusalem. Seminars to relate equally to interpretation of needs and how to meet the needs. The seminars might be held in November or at another time.

- d) Special seminars on each continent with small groups of leaders from various countries, as clinical meetings on campaign problems and the role of leadership.
- e) Invitation by UJA to selected leaders of other countries to join all UJA missions in Israel: Annual Study Mission, Women's Division Mission, Young Leadership Missions, University Missions, and Operation Israel Missions.
- f) Invitation by Keren Hayesod to Americans to join missions they are holding in Israel.
- g) Sub-missions to various parts of the world with JDC and related operations, by selected groups of leaders from various countries.

4. Professional Leadership

- a) Resident program of the UJA and CJFWF for foreign professionals to provide training over extended period.
- b) Visits by American and other professionals to selected countries with Keren Hayesod campaigns: (1) where there is especially good campaigning, for example, Antwerp diamond industry; (2) where weak campaigns need special help.
- c) Annual retreat at a place such as Onchiota in the U. S. for selected professionals throughout the world involved in campaigning.
- d) Annual retreat in Jerusalem for similar group.
- e) Invitation to selected professionals throughout the world to joint special fundraising missions in Israel of both the UJA and Keren Hayesod.

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PB:as

February 26, 1971

UNITED ISRAEL APPEAL, INC.

515 PARK AVENUE
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April 28, 1971

DEWEY D. STONE
HONORARY CHAIRMANGOTTLIEB HAMMER
EXECUTIVE VICE CHAIRMANISADOR LUBIN
CONSULTANT FOR PROGRAMS
IN ISRAELMAURICE M. BOUKSTEIN
COUNSEL

Dear Delegate:

I. TRAVEL ARRANGEMENTS

I trust that by this time you have firmed up your travel arrangements either through your own travel agent or through Field Travel Service. All arrangements made through Field Travel have been reported to us automatically so that we know when and how you are leaving. If you have made your travel arrangements through your own local agent, will you be good enough to let us know the flight number, date and time of your departure. We request this information so that we can arrange for someone to meet you upon arrival in Israel and assist you through immigration and customs.

II. AGENDA

The tentative agenda for the Assembly, as approved by the Planning Committee last week, is as follows:

Monday, June 21st
12 noon to 4 PM

All delegates will be requested to call at the offices of the Jewish Agency to pick up their credentials and to sign the agreement reconstituting the Jewish Agency. A photographer will be on hand to take your picture signing this historic document.

8:00 PM

Opening session at the Binyanei Haoooma (Convention Center): This session is the ceremonial opening of the Assembly. Presentation of the agreement reconstituting the new Jewish Agency; greetings on behalf of the Government and the Municipality; a keynote address by Louis Pincus.

Tuesday, June 22nd
9 to 11 AM

A business session devoted to necessary legal action; a programmatic presentation of the budget by the Treasurer, Mr. Leon Dultzin; a statement by the Minister of Finance, the Hon. Pinchas Sapir; and then a recess of 15 minutes.

11:15 AM to 1:15 PM

The Assembly splits into 9 panels to examine, in depth, the work of the Jewish Agency (see my letter of April 27th re panels).

2:30 to 5:30 PM - Panel Sessions

Wednesday, June 23rd
9 AM to 1 PM Panel Sessions

2:30 to 5:30 PM The Assembly reconvenes in plenary session and various panels begin to report.

Thursday, June 24th
9 AM to 1 PM

Panels complete their reports to the plenary session.

2:30 to 5:30 PM

The Assembly holds its concluding business session: considers resolutions, elects officers and Board of Governors; approves budget and transacts such other business as may come before the Assembly.

8:00 PM

Closing session of the Assembly at the Binyanei Haoma. This will be a public session with representatives of the Government participating. An interesting program of a festive character is being planned.

You will note that no functions have been planned for either luncheon or dinner. This is designed to give panel committees and other groups an opportunity to meet and work.

There will be one closed meeting of delegates to the Assembly for a security briefing. This will probably take place on Tuesday evening, June 22nd, but we will reconvene this session at a later date.

III. ARRANGEMENTS FOR VISITORS

Wives (or husbands) and children of delegates from overseas will be invited to the plenary session. During the periods when the panels will be working, we will offer tours in and around Jerusalem for these visitors.

If you are planning to come before the Assembly opens, or intend to remain on after the Assembly closes, and desire hotel reservations, tour arrangements, etc., please let us know what are your wishes and we will attempt to arrange these matters for you.

IV. HOTEL RESERVATIONS

We are attempting to firm up hotel reservations as quickly as possible. Due to the heavy tourist traffic, we have been asked to divide our American delegation into two hotels, the Intercontinental and the King David. Both are equally comfortable. Many of our top leadership have indicated a preference for the Intercontinental. We are trying to be as fair as possible in the distribution of hotel rooms, on a first-come-first-served basis. People with families requiring more than one room will be asked to accept reservations at the Intercontinental Hotel. We hope you will accept our judgment in these matters.

V. BIOGRAPHICAL MATERIAL

Will you be good enough to fill out the enclosed form and return to us as soon as convenient.

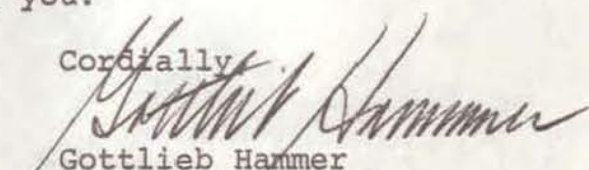
VI. MAILINGS

There is at the present time a whole series of background papers in preparation for distribution to the members of the Assembly. These should be available for mailing around June 1st, and we hope to get them to you in time for your information before you leave for Jerusalem.

If there are any specific questions not covered in these circular letters, will you please be good enough to contact either Grace Gray, at this office, or myself.

I look forward to seeing you.

Cordially


Gottlieb Hammer
Executive Vice Chairman

GH:gg
enc.

MEMORANDUM

To: Z. Shaham and Z. Chinitz

12 July 1972

From: Harry M. Rosen

Re: Scope of Training
Center Activities

The following are some thoughts about the kinds of activities which the Center should be conducting. The desirability of the activities suggested is predicated on the needs of the campaign world, and also on the need to make maximum use of the Center resources (thereby justifying a not insubstantial year-round overhead!)

1. Training Fund-Raisers

This, of course, is the basic task and *raison d'être* of the Center: training newcomers to the field and those with little experience. In this connection, particularly with reference to newcomers, we have to be concerned about numbers. i.e. realistically, how many new people can be absorbed each year by the field? This has to be thought through carefully. Certainly, we will have a better idea when Zonig finishes his current round of discussions. In any event, I believe we should go slowly at the beginning, perhaps as few as 15 trainees the first year, and a similar number the second year. Not only will this give the school time to make its mistakes and correct them, but it will also give us some notion of the absorptive capacity of the fund-raising field, as well as our ability to recruit new people.

As for length of training, we are proposing a five-month curriculum. This may have to be modified downwards, although five months is not too much time to train people for a new career.

Also, we must take into account the differences in campaign calendars throughout the world, a difficulty already encountered by Zonig. The teaching schedule, therefore, will have to take these differences into account.

2. Refresher Courses

These would be short courses for executives and other regular campaign personnel. At the very least, the Center could contribute badly needed knowledge of Israel in all the aspects that should concern campaigners. The Center would also provide a distillation of what is new and interesting around the world from a fund-raising viewpoint. Another important aspect of this kind of training would be to learn how to use the resources of Israel (e.g., missions; speakers; priority of needs, etc.) most effectively.

/....

These courses could be tailored for small groups (or even individuals) for periods of two to four weeks.

3. Courses for Specialists

These would be for such specialists as public relations officers, heads of special divisions such as women's division, special projects. Focus would be on learning about Israel and campaigning in terms of what would be most useful for the particular specialty involved.

Courses could be arranged for periods of one to four weeks.

4. Lay Leaders

Three groups suggest themselves: overall campaign and division chairmen; key workers; young leaders.

Courses can be arranged for periods of two to 10 days, depending on the time available to the lay leaders.

5. Israeli Speakers

Courses of 2 to 5 days could be offered.

6. Agency and other relevant personnel

These would be one to two day seminars for Jewish Agency and other personnel who have frequent contact with missions and/or with individual campaign People, lay and professional.

LIST OF STUDENTS: FUND RAISING INSTITUTE - FIRST COURSE

	<u>NAME</u>	<u>AGE</u>	<u>CITIZENSHIP</u>	<u>COUNTRY of ORIGIN</u>	<u>SPONSORING ORGANIZATION</u>	<u>EDUCATION</u>
<i>England or South Africa</i>	1. Ben Reuven, Ziva	40	Israel	Israel	Jewish Agency Exec.	Hebrew Univ. - B. A. Lit., Educ.
	2. Bernstein, Gene	23	USA	USA	United Jewish Appeal	State Univ. of New York, Stony Brook, B.A. Psych.
	3. Bierman, Kenneth	25	USA	USA	United Jewish Appeal	Rutgers Univ. - B. A. Biological Sciences
<i>Scandinavia, Munich</i>	4. Bratt, Dr. Cwi ^{Harry}	38	Israel	Churzow	Keren Hayesod	Hebrew Univ. T. A. - Law M. A. , L. L. M. Univ. of London, King's College - PhD. Law
	5. DiCapua, Dario	42	Israel	Italy	Keren Hayesod	Hebrew Univ. - B. A. Pol. Sci., Hist.
<i>England</i>	6. Ered, Eliahu ^{-pulling relations}	49	Israel/ British	Germany	Joint Palestine Appeal, England	Liverpool Talmudic College
	7. Ergov, Drora ^{Hezel Fishman women's division divorce}	42	Israel	Israel	.	Teacher's Certificate, Seminar Hakibutzim
	8. Eshel, Menachem	41	Israel	Poland	Keren Hayesod	Hebrew Univ. - <u>M. Jur. Law</u> Univ. of Manchester - Bus. Administration
	9. Eyal, Moshe	37	Israel	Germany	Keren Hayesod	Technical High School
	10. Gur, Moshe	35	Israel	Israel	Keren Hayesod	Hebrew University - 2 yrs. Econ. and Educ. 2 yrs. Law
	11. Heilpern, Dan	32	Israel	Israel	Keren Hayesod	Hebrew Univ. - B. A. Econ., Statistics
	12. Luzzatti, Vittorio	39	Italy	Italy	Keren Hayesod	Univ. of Milan - Electronics, Law
<i>England</i>	13. Magidov, Moshe	43	Israel	Israel	Joint Palestine Appeal, England	Alexander Foundation

LIST OF STUDENTS: FUND RAISING INSTITUTE - FIRST COURSE (two)

	<u>NAME</u>	<u>AGE</u>	<u>CITIZENSHIP</u>	<u>COUNTRY of ORIGIN</u>	<u>SPONSORING ORGANIZATION</u>	<u>EDUCATION</u>
	14. Millo, Meir	36	Israel	Russia Slavim	UJA of New York	UCLA - B. A. Educ. and Administration Grad. Work - Univ. of Houston, Univ. Mich.
	15. Rivlin, Ze'ev <u>good</u>	37	Israel	Israel	Keren Hayesod	Hebrew Univ. - Law M. J.
England	16. Ronen, Natan	25	Israel	Poland	Joint Palestine Appeal, England	Hebrew Univ. - B. A. Internat'l Relations Political Sci.
	17. Rosemarin, Jerome	48	USA	USA	UJA of New York	City College of New York - Acct., Law
	18. Rothchild, Yvonne <u>Porto Rico</u>	44	USA	Germany	United Jewish Appeal	Commercial Administration, Argentina
	19. Sacks, David	28	USA	USA	United Jewish Appeal	Gettysburg College - A. B. Pol. Sci. Univ. of Wisc. - M. A. Pol. Sci.
Frankfurt	20. Tal, Michael <u>very good</u> <u>divorced</u>	41	Israel	Berlin	Keren Hayesod	Institut Des Hautes Etudes <u>Cinematographiques</u> , Graduation Certificate
Bairich	21. Teutsch, Chananyah	46	Israel	Germany	Keren Hayesod	High School - Germany and Switzerland
South africa	22. Yalon, Jehuda <u>tebe</u> <u>reorder</u>	32	Israel	Israel	Keren Hayesod	Los Angeles High School Strausbourg Univ. - 1 year
	23. Zeira, Dan. S.	44	Israel	Hungary	Keren Hayesod	Hebrew Univ. - M. Jur. Law, Econ.
Australia	24. Ben Yosef (ex navy)					
	25. Goldman, Gidm - JOC gran					

SIX WEEK COURSE OUTLINE ON YOUNG LEADERSHIP - 1 HOUR

1. ORGANIZE

- a) Find and recruit
- b) Mold into a cohesive unit
- c) Create an Esprit d'Corps
- d) Make room at top

2. MOTIVATE AND INSPIRE

- a) Shoa - death
- b) Israel - life - center of Jewish survival, physical and spiritual

3. EXPLAIN MECHANICS

- a) How money is raised
- b) How money is spent

4. TEACH

- a) Seminars
- b) Books
- c) Retreats
- d) Missions
- e) Conferences

5. UTILIZE

- a) Speakers
- b) Solicitors
- c) Chairman
- d) National Boards

6. BY-PRODUCT VALUES

- a) Leadership for educational efforts
- b) Leadership for other Israeli institutions
- c) Leadership for local ~~Israeli~~ institutions.

SENT TO EXECUTIVE COMMITTEE; UJA CAMPAIGN CABINET: CABINETS OF RAC: W.D.: YL
RE: LAY LEADERSHIP SEMINARS AT INTERNATIONAL FUND RAISING INSTITUTE

December 15, 1972

The International Fund-Raising Institute of the Jewish Agency is initiating its first program for lay leadership in Israel this summer, with two ten-day seminars, July 5 - 15 and July 19 - 29. Each of the two scheduled seminars will accommodate up to 20 couples, who will stay in pensions or kibbutz hostels and will participate in lectures, field trips and meetings with Government and Agency leaders as they learn about the land, the people and the future of Israel. Classroom lecturers will include some of the most prominent men and women in Israel in such areas as philosophy, law, archaeology, Bible study, social work, education, economics and science.

If you are interested in this type of challenging, mind-stretching seminar and would like to participate, please contact Don Klein at the UJA office.

The Institute's first course for professionals began in Jerusalem on December 3, with five U.S. representatives joining 18 others who are in training for posts in Keren Hayesod countries. The next scheduled course, beginning June 24, for two months, will be in session during the leadership seminars, and will offer intensive exposure to the history, philosophy and fundamentals of Jewish fund-raising. We believe this represents a valuable double step forward toward unity, maturity and greater productiveness in the worldwide Jewish community.

Sincerely,



Paul Zuckerman

PZ:DMS

י' חשוון תשל"ג
18.10.72

72/111-0

לכבוד

רוב ח.א. מייצג

הסוכנות היהודית

א.נ.,
ס-1

הנדון: עבודות חניכים - הכונה ויעוץ

1. בחציו השני של הקורס אשר יפתח ב-1.12.72 אנו נסיל על חניכיו להכין עבודות בכתב על נושאים אשר נלמדו בפרק הראשון של הקורס.
2. מטרת עבודה זו היא לתרגל את החניך לאסוף נתונים לנושא מוגדר, לעבדם למסמך ולהיות מוכן להציג את הבעיה המושלמת בכתב ובע"פ.
3. הנושא שבגללו אנו פונים אליך ר"ב באנגלית.
4. אנו מבקשים ממך שתסכים להיות המכוון והמיעץ של החניך בנושא הנ"ל. כונתנו שתפנה אותו למקורות כתובים, תשיב על שאלותיו, תחרט מכושרו ולבסוף תחזה דעה על החניך ועבודתו המוגמרת.
5. לאחר שנקבל הסכמתך נתקשר אתך שנית כדי לקבוע את המועד ושיטת הכונת החניך.

בברכה,
זאב שחם
מנהל המכון

דש/ימ

ש-72/18

11. CAMPAIGN GOALS AND QUOTAS

Of course, this will have to be studied from the perspective of Israel.

- a) How is world-wide goal established?
- b) What are the pro's and con's of "Budget of Needs" or "Statement of Needs?"
- c) How are country goals established?
- d) How are campaign goals or local quotas set?
- e) What is it all worth in raising money?

United Jewish Appeal 1290 avenue of americas · new york, n.y. 10019

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TELEPHONE: (212) PLAZA 7-1800 CABLE ADDRESS: UJAPPEAL, NEW YORK
590 n. vermont ave., los angeles, calif. 90004 • (213) 663-3191

ALVIN H. GILENS
Associate National
Campaign Director

May 21, 1973

Mr. Yaacov Aloni
c/o The Jewish Agency for Israel
Institute for Fund Raising
Jerusalem, P. O. B. 6001
Israel

Dear Yaacov,

Thank you for your response to my memo of April 26th. Enclosed please find sections from Rabbi Friedman's lectures of December 31st and January 14th. As you can see, I have done no work on them, as I was waiting to receive parts "one and two" for each lecture. Unfortunately, you never sent any of this to me contrary to what you had promised immediately prior to my departure from Israel in late February.

I must admit to you that I am disturbed by what has happened with regard to his matter. I had volunteered to assist with the editing knowing that Rabbi Friedman did not have the time to involve himself in such a project. Had you made good on your commitment to deliver to me (one way or another) the last of the unedited transcriptions, all would have been completed and in your hands by this time. Now the burden has been placed on his shoulders, something that should not have occurred.

This week I will forward to Dr. Nesher the completed edition of his lecture for final approval and will ask him to send it on to your office. Within the next ten days, I will mail you the last of the Friedman lectures, dated January 28th.

Sincerely,

David

David S. Sacks

cc: Rabbi Herbert A. Friedman ✓
Irving Bernstein
Alvin H. Gilens

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Executive Vice President
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President, Women's Division
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THE JEWISH AGENCY FOR ISRAEL
INSTITUTE FOR FUND RAISING
הסוכנות היהודית לישראל
המכון להכשרת פעילי מגביות

Mr. David S. Sacks
United Jewish Appeal
590 North Vermont Avenue
Los Angeles
California, 90004

29 May 1973
O-789/73

Dear David,

I read your letter dated 21 May, sent to Aloni, and I took the liberty to respond - although it wasn't addressed to me.

During your stay with us - I thought you'd learn a little bit more about me and my point of view on the facts of life. Let me tell you what's wrong with the way you dealt with the matter;

- A. You didn't volunteer to work on Rabbi Friedman's paper - you and I made a bargain which I accepted - that you will work on Herb Friedman's lectures until finished - and for that you will be excused from preparing two papers that every student had to prepare for homework. You were also given permission to be absent from some lectures and at least one tour - to enable you time to work on the material while in Israel.
- B. Even if you didn't receive the additional papers - I expected a letter from you informing us that you couldn't finish and why. Instead - as a response to the letter of 26 April - from Aloni - you sent us the unfinished work with a note that you had not received what you were supposed to -- and that was three months after you left Israel.

This is not according to your part of our deal.

Finally - I can't follow your reasoning for sending copies of this letter to the people you sent them to. In your letter to Aloni there is a "smell of accusation" in the whole matter -- which isn't fair -- or true.

By careless and irresponsible talks that some of the American students had with some people about Aloni - enough unjustified damage was done to him and there was no need to continue by sending the copies the way you did.

Nevertheless, I would like to hear from you concerning your experience on what you gained from the course, since it's three months since you are back in the field.

Sincerely yours,

Ze'ev Shahan
Ze'ev Shahan
Director

CC: Rabbi Herb Friedman
Irving Bernstein
Elvin H. Gilens

JERUSALEM, P.O.B. 6001, TEL. 531276

THE JEWISH AGENCY FOR ISRAEL
INSTITUTE FOR FUND RAISING

הסוכנות היהודית לישראל
המכון להכשרת פעילי מגביות

August 29, 1972

TO: Rabbi Herbert Friedman
FROM: Ze'ev Shaham

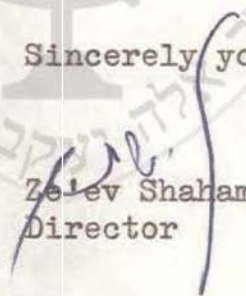
Enclosed please find part of the curriculum outline of our Institute.

I would very much appreciate your giving your attention to Paragraph 2 of page 3 through page 4. I am sure you will find material of interest to you.

Please let me know what part of this section you will be ready to teach during our first course, which commences December 3, 1972.

I will be in touch with you in the near future to work out details.

Sincerely yours,


Ze'ev Shahan
Director

ZS:hb
enclosure

Curriculum Outline of Community Organization and Fundraising
Sequence

Prepared by Dr. Benjamin Lappin
Dean, School of Social Work,
Bar-Ilan University.

Duration

The Course is projected to run for five days weekly for 12 weeks.

Emphasis

Within the projected time allotment the Course will stress training to develop skills in conducting community-based fundraising activity. Course content suggested herein has been designed to give the learner:

- a. Understanding of the social and cultural forces acting upon the community and its leaders engaged in fundraising;
- b. Mastery of the steps and procedures entailed in campaigning;
- c. Insight into self and the community's volunteers to instill motivated professional leadership throughout the various phases of the campaign.

Course offerings will be given in the following areas:

- 1) Jewish Philanthropy in the Social Welfare Context
- 2) The Fundraiser and the Community Environment
- 3) Aids to Fundraising
- 4) Tutorials

A fifth area of study will be in the nature of a practicum in which content given in seminars will be tested in actual work experiences.

Content

The following are tentative course outlines suggesting coverage of subject matter:

1. Jewish Philanthropy in the Social Welfare Context: (3 hrs. weekly, total: 36 hrs.)

Britain: The Poor Law and the Guardians, the Charity Organization Societies

- The origins of the Jewish Board of Guardians
- Nineteenth century voluntarism (the COS movement, the Fabians) and its influence on public welfare in Britain
- The affect of these developments on philanthropy within British Jewry

North America: The Shift from the COS movement to the Council Movement on the American scene

- Welfare voluntarism in the American populist tradition and the "watch-dog" role on government-sponsored social services
- The entrenched position on sectarian social services in America
- The affect of these influences upon American Jewry and the shift from landsmanshaftn-types of mutual aid to broad community-based sponsorship of social services.

North America (contd.):

- The pioneering role of American Jewry in federated fund-raising for North American society as a whole (e.g. Cleveland).
- The pioneering effort of American Jewry in raising standards of social services
- The unification of sectarian fundraising and social planning groups.
- The significant role of Jewish community leaders in this inter-sectarian trend
- Non-sectarian funds and councils as avenues to recognition and integration for North American Jews
- The role of Jewish ideologies and institutions (The Jewish Agency, Keren Hayesod) in maintaining a sense of shared fate among Jewish communities. The Jewish community as pioneer in overseas aid following World War I and World War II.
- The Federations and their emphasis on funding social services.
- The shift to Welfare Funds and their support of total Jewish community needs.
- The emergence of unprecedented needs overseas; survivors of the holocaust, the emergence of Israel as an independent state.
- The establishment of the UJAs to meet unprecedented needs.
- Issues; local vs. overseas needs, American Jewry and its new perception of Jewish survival following the Six-Day War in June of 1967.
- The meaning of activism in Jewish life in the post Auschwitz era
- Fundraising as an aspect of Jewish activism.

World Jewry:

- East European Jewry and its state of prolonged exclusion from the surrounding societies.
- The traditional separatist Kehillah approach to community welfare.
- The quasi-official position of the Kehillah
- Voluntarism within the Kehillah approach to community welfare
- The Kehillah and its basis in financial support
- The Welfare State and Western Europe; welfarism without the populist volunteer movements characteristic of the English-speaking countries.
- The Jews in the free world (outside of the English-speaking countries) and forms of community organization
- Methods of financing Jewish organized living in these countries.
- Methods of aiding their brethren facing persecution in hostile lands.

Israel:

- Palestine and the pre-Zionist community
- The receiver community of largess from Jews throughout the world
- Halukah and the tradition of tzedakah
- The pre-Mandate Jewish settlement
- Forms of support for Zionism from world Jewry

Israel (continued):

- The significant role of individual wealthy patrons
- The Yishuv under the British Mandate
- Social welfare needs in the urban communities and the East-European Kehillah as a model.
- The rural kibbutz as a new community type rendering poverty obsolete
- The Keren Hayesod as symbol of a new link with world Jewry
- The Keren Hayesod as change agent in the traditional relationship between giver and receiver of philanthropy.
- The shift from charity for the maintenance of the needy to a perception of a partnership in a destiny between Israel and world Jewry.
- The respective roles of the partners throughout the existence of the Keren Hayesod
- The emergence of Israel as a Welfare State
- Welfarism in the image of the continental European Welfare State
- The absence of citizen volunteer movements characteristic of the English-speaking world.
- Voluntary participation and parliamentary representation as two essential dimensions of democracy in the English-speaking world.
- Differing traditions and their influence on Jewish communities in other parts of the world.
- The partnership amid varying traditions and the implications for community-based voluntaristic fundraising.

2. The Fundraiser and the Community Environment: (4 hrs. weekly, total: 48 hrs.)

The Community, its formal institutions, ideologies and beliefs and informal groups

- The leaders and the substructure
- The leaders and their images; charismatic and resource leaders, visible and invisible leaders, vested interest and community-wide leaders
- The leaders and power, influence, authority, status and prestige
- Community responses to individual leaders
- Motivations for leadership; ideological commitment, family tradition, self-interest, service ideal
- Relationship of the Jewish community to the larger society
- Jewish participation in the education, cultural, political and financial life of the larger community
- The larger community and Jewish issues; problems, overt and latent
- The role of Jewish leadership as interpreters in the general community

Needs and Goals

- The institutions and their claims on the community's support
- The articulators of the needs and their outlooks; local, national, global
- The process of decision making and reaching consensus as to priorities

Needs and Goals (continued)

- The roles of local protagonists, neutrals and opponents in establishing priorities
- Types of information in interpreting need
- The use of local influentials and outside leaders in promoting causes
- Clarity in decision making as to needs and priorities
- Reflecting needs and priorities in appropriate money terms

Pre-campaign Phase; Transforming Social Needs Into Fundraising Objectives

- Office procedures; complete list of prospects and record of giving
- Preparation of pledge cards
- Procedures for recording, billing, promotional mailings, meeting notices
- Clearly-defined assignments to members of senior and clerical staffs
- Leadership of Campaign; Role of top leadership task force in selecting and enlisting key leadership
- Setting standards for campaign leadership
- Breakdown of campaign structure into divisions
- Appointment of divisional leaders and work teams
- Breakdown of overall campaign goal into divisional quotas
- The campaign calendar and timing of events in accordance with accepted deadlines
- Clearly defined assignments to all volunteers

✓ Campaigning Phase; Fundraising Structure

- Rating of prospects in accordance with accepted standards of giving
- Solicitation strategies of top givers
- Review of giving and reassigning of prospects
- Recruitment of new givers
- Public recognition to workers and leaders through reporting events
- The maintenance of campaign morale and incentives to meet quotas
- Public accountability through regular reports to the community
- The campaign as an expression of the community at broad base

Post Campaign Phase; Evaluation of current campaign structure

- Recognition and training of new campaign workers
- Promotion of promising volunteers
- Appointment of follow-up committee
- Supervision of collection procedures
- Public after-campaign event; recognition for work accomplished and rededication to challenge ahead

+

The Roles of the Fundraiser

Administrator

- Campaign budget
- Staff supervision
- Office management
- Physical arrangements
- Assembly of publicity materials; the worker's kit

Organizer

- Mobilization of community resources
- Development of campaign strategy
- Maintenance of community interest and morale
- Timing and pacing of campaign activity

Catalyst

- Leadership development
- Stimulation of commitment and incentive among teams of workers
- Creating the link between local campaign activity and the larger purpose of Jewish continuity

Consultant

- Advice to leadership in decision making;
- On problems in campaign structure, organization and strategy
- On interorganizational difficulties
- On problems of vested interests
- On personality problems

3. Aids to Fundraising: (2 hrs. weekly, total: 24 hrs.)

The following are suggested as short-term offerings, each to run for about two weeks. The aim is to give the learner a knowledge of the basic principles and a measure of ability to use specific skills which have an important bearing on fundraising.

Public Relations

- Creating a receptive mood for the campaign
- Use of written materials; themes, slogans, releases, human interest stories, interviews
- Specific publicity pieces; the worker's kit as a tool of interpretation to prospects; its uses
- Deployment of personalities; local, visitors
- Exploitation of international issues
- Adapting nationally prepared materials to the local scene
- Inter-agency relations
- Inter-professional relations
- Press (and other media) relations
- Exploitations of favorable "spot" news developments
- Handling unfavorable developments
- Differing attitudes of the leadership to publicity and public relations.

Budgeting

- Analytical and interpretive skills in budgeting
- Assembling the materials for the budget
- Operating and capital budgets
- Line-by-line and functional budgeting
- The budget as social needs transformed into fiscal terms
- The budget as ordered data, as ready overview of needs, resources, priorities and responsibilities facing the community
- The budget and clues to the community's fundraising record
- The local budget
- Budgets of national and world Jewish organizations

Fact-finding

- The worker as researcher
- Specific data as the basis for decision making to establish policy, to resolve differences, to deal with rumours, to restore harmony, to negotiate issues, to fix goals, to understand needs
- Locating essential facts, collateral material, background information
- Drawing reliable inferences from the data
- Sources of information; primary, secondary

Writing Skills

- The fundraiser as writer of minutes, memoranda, proposals, public statements
- Role and purpose of different types of documents
- Organizing and presenting facts and ideas on paper
- Relevance, clarity, brevity
- Assistance to leaders in preparation of speeches and written materials
- The worker's roles as resource to volunteer leaders, consultant, collaborator, "ghost"
- Ethical implications of latter role

Administration

- Principles of administration
- The office, the clerical and senior staffs, the campaign
- The physical arrangements of campaign events
- The programming of events
- The campaign calendar
- The administrator and the web of human relations
- The process of delegation
- Clarity of roles and staff morale
- The budget
- Personnel practices
- The role of lay leaders in the administration of the fundraising operation
- The administrator as planner, as negotiator, as mediator, as link between the agency board and the community

7.

- Flexibility within fixed goals and firm deadlines
- The administrator's knowledge of the electronic office equipment and understanding of its uses
- Understanding of tax laws, financial trends, laws relating to legacies and endowments
- Knowledge of community resources and their uses
- Knowledge of community programs; education, community relations, recreation

The Small Committee

The Small Committee as the locus of implementing policies and decisions

- The small committee and its accountability to the Board
- Choosing members for small task forces or committees
- Types of problems handled in committee; advance giving, standard setting, special givers, changes in campaign strategy
- Preparing the committee meeting
- Advance notices and follow up re attendance
- Assuring favorable atmosphere
- Location of the meeting; the office, hotel, the leader's home
- Preparation of the agenda
- Clarity of the issues to be discussed
- Advance preparation with the chairman
- Clarity as to role of all members present
- The worker and the leader at close quarters
- The enabling capacities of the worker, comfort in establishing worker-volunteer relationships
- The small meeting and confidentiality
- Differences in working with small task groups, the board and mass programs

4. Tutorials (2 hrs. weekly, total: 24 hrs.)

Tutorials will be scheduled to help students relate course content to specific countries in which they will be working. In the tutorials students will have an opportunity to compare and contrast:

- Common and different features of Jewish organized living throughout the world
- Attitudes to giving
- The universal applicability of fundraising techniques presented in courses
- Possibilities of adapting organizational procedures of campaigning to specific communities
- Possibilities of building modern fundraising methods on long-standing traditions
- How to deal with resistance to new methods.

5. The Practicum (8 hrs. weekly, total: 96 hrs.)

Exposure of the students to practical activities will require an initial period of orientation of perhaps the first three weeks of study.

Students will visit such agencies as Keren Hayesod, the Jewish Agency. Field trips to absorption centers, recreation and welfare agencies, and so forth should be arranged. The purpose of these visits is to give the students a direct contact with the various programs for which they will be raising the funds in other countries.

The second phase of the practicum will constitute an assignment to a specific agency setting. Placements could conceivably be worked out with the Jewish Agency, U.I.A., U.J.A. and the Keren Hayesod. Student involvement could take the form of assisting in the preparation of materials, schedules, lining up resource people, etc., for approaching missions, conferences and other group visits of leaders from abroad. Other types of involvements might include observation and where feasible direct participation during such visits.

Further possibilities include participation in the work of various local agencies whose programs are related to the Keren Hayesod program. Field work entailed in the practicum is to proceed under supervision to guide student learning in the field.

The Curriculum and Methods of Teaching

Teaching in class will be based on the seminar approach. Case material will be used in which community campaigns will be analyzed and evaluated by students and instructors. Role playing and simulation are recommended to bring the learner as closely as possible to the actual work situation within the class setting.

Student free time should be subjected to a measure of control to ensure that reading and other assignments are met. Sensitivity training should be considered as a means of achieving greater depth of insight into self and others the student will be engaging as fundraiser.

Responsibilities of Teaching Staff

- Preparation of seminar sessions
- Assignments to students, evaluating and grading assignments
- Evaluation as a body of total student performance
- Assist in reviewing applications for admission to the Training Center

Coordinator of Studies; Responsibilities

- Meetings with teaching staff to evaluate course content
- Evaluation of feed-back from students
- Planning changes in course offerings
- Planning new directions for curriculum
- Supervision of students in the field
- Planning field assignments for each student
- Planning orientation sessions for students
- Contact with students in their free time

- Student advising
- Student follow-up after graduation
- Periodic recall of students for refresher courses
- Contact with graduates on the job
- Processing applications to the Training Center

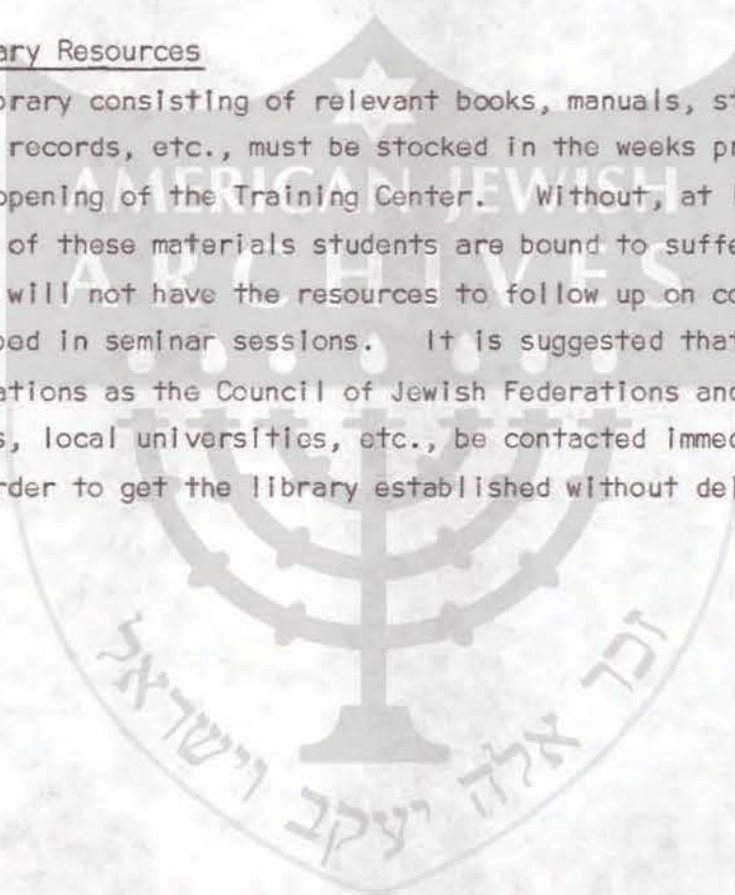
Sponsorship of Training Center

Board attendance at and participation in opening of Center

Board participation in graduation exercises

Library Resources

A library consisting of relevant books, manuals, studies, case records, etc., must be stocked in the weeks prior to the opening of the Training Center. Without, at least, a large core of these materials students are bound to suffer in that they will not have the resources to follow up on content prescribed in seminar sessions. It is suggested that such organizations as the Council of Jewish Federations and Welfare Funds, local universities, etc., be contacted immediately in order to get the library established without delay.



כ"ח בחשוון תשל"ג
5.11.1972



לכבוד
מר זאב שחם
מנהל המכון להכשרת פעילי מובילות
ח.ד. 6001
ירושלים.

א.נ.3,

הנידון: עבודת חניכים - הכוונה ויעוץ

1. קמלתי את בקשתך לשמש כיועץ לחניכים בנושא
2. אני מוכן לשרת כמפקיד חזה.
3. אשמח לקבל מידע נוסף בנושא זה.

בברכה,

הרב חיים א. פרידמן

THE JEWISH AGENCY FOR ISRAEL
TRAINING CENTER FOR FUND-RAISERS

GENERAL

1. The Center has been established pursuant to a decision of the Board of Governors of the Jewish Agency.
2. The Center will be located in Jerusalem. At this stage, it will train fund-raisers ~~which make~~ ^{for bodies} funds available to the Jewish Agency.
3. The Director of the Center will be directly responsible to the Chairman of the Jewish Agency Executive. ~~An Administrative Committee will be established to guide the activities of the Center.~~
4. The program of studies will be determined by the Center, in conjunction with an Advisory Committee composed of persons competent in these matters.

PURPOSE

5. To train administrative and field personnel as fund-raisers, emphasize organization, administration and conduct of campaigns.

LOCATION

6. The permanent location will be Jerusalem. During the first stages, it will be housed at the Binyanei Ha'Ooma (National Convention Center).

DURATION OF COURSE

7. At present, a course of ~~four~~ ³ to ~~five~~ ⁴ months is envisaged, not including practical field work. (The duration of subsequent courses of study will be determined on the basis of experience with the first course.)

CURRICULUM

8. The main subjects of study will be:

- (a) Jewish history
- (b) History of the Zionist Movement
- (c) The Jewish Agency: its institutions, tasks, methods of operation
- (d) Jewish communities in the Diaspora; common and unifying characteristics
- (e) Communications: public relations publicity
- (f) History of Israel; relations between Israel and the Diaspora
- (g) Israel: its problems and needs
- (h) The Middle East conflict
- (i) Administration, organization and conduct of campaigns
- (j) History of fund-raising
- (k) Fund-raising techniques

APPROACH TO TRAINING

9. The students of the Center will be in residence during the course of study. Every effort will be made to deal with individual situations and needs, both personal and instructional.

METHODS OF INSTRUCTION

10. Various methods will be employed, including:

- (a) lectures
- (b) discussions and seminars (in small groups, by panels where desirable)
- (c) independent individual work (including projects)
- (d) field visits
- (e) films and other audiovisual material

STUDY MATERIALS

11. Insofar as possible, course matter will be available in printed form, and will be distributed to the trainees in accordance with the curriculum schedule.

RECRUITMENT OF TRAINEES

12. Trainees will be recruited from among Israeli and overseas candidates.
 - (a) Israeli candidates will be passed upon by an Admissions Committee composed of representatives of Keren Hayesod, UJA, the Center.
 - (b) Overseas candidates will be recruited through local agencies. Each participating country will establish a recruiting and admissions machinery. Final approval rests with the Center.

QUALIFICATIONS OF CANDIDATES

13. Qualifications of candidates will be determined finally in the light of experience with the first course. For this course, there will have to be considerable flexibility in candidate selection. In general, the following qualifications seem desirable:
 - (a) Age -- 23 to 49
 - (b) Education -- more than secondary school
 - (c) Experience -- at least some in communal work
 - (d) Jewish background

MUTUAL OBLIGATIONS

14. The candidate will agree in writing to serve for a minimum of three years at the place or places laid down by the organization which has recruited him.

The recruiting organization will give its trainees, at the completion of the training period or at such appropriate time as will be agreed upon, a work contract. The conditions of employment will be in accordance with the standards and practices of the recruiting organization.

NUMBER OF TRAINEES

15. The exact number of trainees will be determined by the needs of the participating campaign organizations. It is suggested, however, that for the first course the number should not exceed 25.

CENTER STAFF

16. A total administrative staff of six persons is proposed, as follows:

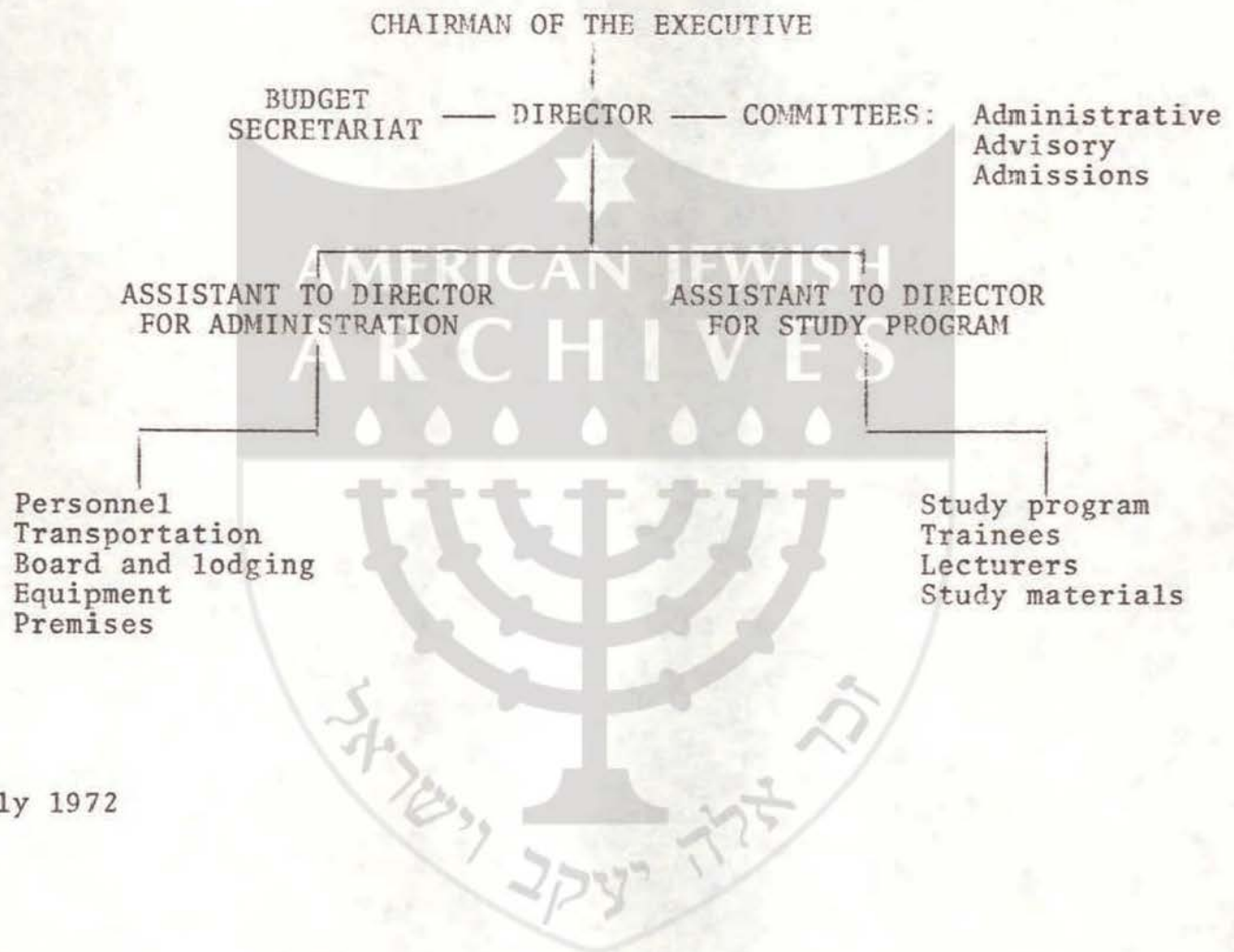
- (a) A Director, to be responsible to the Chairman of the Jewish Agency Executive
- (b) An Assistant to the Director, to be responsible for the study program
- (c) An Assistant to the Director who will be responsible for the day-to-day administration of the Center
- (d) A Secretariat of three persons

BUDGET

17. To be submitted separately.



JEWISH AGENCY TRAINING CENTER FOR FUND-RAISERS



July 1972

CURRICULUM PROPOSALS FOR TRAINING CENTER FOR FUND-RAISERS

A WORD OF EXPLANATION

The attached memorandum was prepared on the basis of what is considered an ideal training period, namely, five months plus field work.

In discussions subsequent to preparation of the attached, it became clear that the bodies ultimately responsible for recruiting and placement of trainees prefer a shorter period. Therefore, there are suggested below modifications of the attached schedule to make possible a course of 14 weeks, i.e., 490 hours of training, not including field work.

In this first year it is intended that this course begin in mid-November. However, it is understood that provision will be made for trainees who will be available only in mid-1973.

To meet the needs of a 14-week course it is proposed that the hours recommended in the attached memorandum be modified as follows:

SCHEDULED COURSES AND ACTIVITY		TOTAL HOURS	
		Hours	
A. <u>General Studies</u>			110
1. Jewish History	25	Yavetz	
2. The Zionist Movement	10	Laron	
3. Facts about Israel	40	Rosen	
4. Israel and the Arab World	20	Ruppin	
5. The Jewish Condition in the World	15	Orion	
B. <u>The Organized Jewish World</u>			80
1. Jewish Communities and Organizations	40	Rosen	
2. The Jewish Agency	40	Rivlin - Gileadi	
C. <u>Fund-Raising</u>			140
1. History, Motivations and Traditions in Jewish Philanthropy	10	Chinitz	
2. Campaign Organization	20	Chinitz, Friedman, Kessler	
3. Fund-Raising Techniques	100	Friedman	
4. Communications	10	Rogov, Bar-Am	
D. <u>Language</u>			60
E. <u>Field Work in Israel</u>			50
F. <u>Individual Projects</u>			50

MEMORANDUM

To: Mr. E. Shaham

10 July 1972

From: Harry M. Rosen

Re: Curriculum proposals
for Training Center
for Fund-Raisers

The following will summarize our (Chinitz, Rosen) discussions with you on curriculum proposals and scheduling.

Instruction approaches and other details are included in your general memorandum on the Center. This memorandum describes the proposed curriculum. We project a course of five months, beginning November 1, 1972 and closing March 29, 1973. We further propose a five-day week, with seven hours per day of scheduled activity. The total period has 21 weeks. Allowing for one week of recess, we are able to schedule 20 weeks, at 35 hours per week, giving a total of 700 hours of scheduled activity, as outlined below.

<u>SCHEDULED COURSES AND ACTIVITY</u>		<u>TOTAL HOURS</u>
A. <u>General Studies</u>	<u>hours</u>	145
1. Jewish History	30	
2. The Zionist Movement	15	
3. Facts about Israel	50	
4. Israel and the Arab World	30	
5. The Jewish Condition in the World	20	
B. <u>The Organized Jewish World</u>		100
1. Jewish communities and Organizations	50	
2. The Jewish Agency	50	

/....

	<u>hours</u>	<u>TOTAL HOURS</u>
C. <u>Fund-Raising</u>		155
1. History, Motivations and traditions in Jewish Philanthropy	15	
2. Campaign Organization and Administration	30	
3. Fund-Raising Techniques	100	
4. Communications	10	
D. <u>Language</u>		100
E. <u>Field Work in Israel</u>		100
F. <u>Individual Projects</u>		100

EXPLANATION OF COURSES AND ACTIVITIES

A. General Studies

1. Jewish History - 30 hours

It is hoped that trainees will have at least a minimum knowledge of Jewish history. In any event, detailed knowledge will have to come from readings.

The major thrust of class instruction and discussion will be to convey an understanding of the situation of the Jews in the world today: how they came to be in the countries in which they find themselves, with the occupations they have, the beliefs they hold, the cultures which distinguish them.

Three periods will be treated, the first two descriptively, the third in depth: (1) Abraham to the Destruction of the Second Temple and the Dispersion; (2) The Dispersion to Emancipation; (3) Emancipation to the establishment of the State of Israel; (4) The post-1948 period will be covered by other courses.

2. The Zionist Movement - 15 hours

The purpose is to give an understanding on the nature and role of Zionism and the Zionist movement in the Jewish world today. Class instruction and discussion will include history, present structure (World Zionist Organization and parties), functions, relations to other bodies, special status in Israel, relative influence in Jewish communities.

3. Facts about Israel - 50 hours

The emphasis is conveyed by the title: facts and hard information. Class instruction and discussion will focus on Israel's geography, demographic information, history of immigration (including analysis of various waves), governmental structure and functions, political parties, the economy, services (including the role of voluntary organizations), cultural life, current problems.

(Foreign relations, the Israel Defense Forces, the occupied territories and related matters will be covered in the following course.)

4. Israel and the Arab World - 30 hours

Class instruction and discussion will focus on Israel's geopolitical situation and the factors influencing it. This will include Israel's foreign relations, an analysis of its immediate situation in the Middle East both militarily and politically, policies and activities in respect of the occupied territories. Special consideration will be given to Israel's relations with countries where the campaigns are most active, also with the countries where there is special concern for the resident Jewish populations.

5. The Jewish Condition in the World - 20 hours

This will stress a continent-by-continent, country-by-country review of the situation of Jews in the world. Class instruction and discussion will emphasize those situations which have a direct bearing on the activities for which funds are being raised, for example: Soviet Jewry, Jews in the Arab countries, political ferment in South America, attitudes towards aliyah in the United States, in France.

B. The Organized Jewish World

1. Jewish Communities and Organizations - 50 hours

In generic terms, class instruction and discussion will convey an understanding of basic Jewish community organization, on the national and local levels. More specifically, it will include facts about major Jewish communities: population, sociocultural patterns, leadership, relationships with non-Jewish community. Emphasis will be on how the communities organize to meet their local and national Jewish responsibilities (provision of education and welfare services, civic defense) and how they are organized and function in relation to Israel.

2. The Jewish Agency - 50 hours

Class instruction and discussion will focus on the history of the Agency, its structure and ways of operating, functions (including department-by-department review), relations with other bodies (including description of Keren Hayesod and Keren Kayemeth; division of function with WZO), relations with Israel government ministries and agencies.

The Jewish Agency Budget and the needs it represents will receive particular attention.

C. Fund-Raising

1. History, Motivations and Traditions in Jewish Philanthropy - 15 hours

In general terms, this course will include an examination of the psychology of giving, social and cultural patterns which influence philanthropy.

More specifically, it will stress how Jewish philanthropy -- attitudes and works -- has developed throughout our history, Jewish religious and ethical commitment (including the meaning of "tsedakah"), influence of Jewish historical and contemporary cultural patterns on giving.

2. Campaign Organization and Administration - 30 hours

Class instruction and discussion will include structure, administration and management of campaign organizations; relationship to community; budgeting; planning; development and education of lay leadership; processing of pledges and cash; legal considerations in giving and in transmission of funds to Israel; cash collections; relationships to national and/or international fund-raising bodies (National UJA, Keren Hayesod et al); relationships to the Jewish Agency and related bodies.

3. Fund-Raising Techniques - 100 hours

Class instruction and discussion will focus on various approaches to solicitation (individual, small group, mass); education of campaign workers; use of Israel for education and solicitation (e.g. missions); use of speakers and solicitors from Israel and other countries; role of professional fund-raiser.

Sociodrama will be a major technique of instruction.

4. Communications - 10 hours

This will include general and ongoing public relations, campaign publicity, use of printed materials, use of speakers, public media. Special attention will be paid to local attitudes towards publicity on the part of campaign leadership and the Jewish public, based on the community's social and cultural patterns.

D. Language - 100

It is proposed that all trainees from abroad study Hebrew and all Israelis study English (other language needs will be considered). Individual levels of knowledge and fluency will be taken into account. There will be three sessions per week of approximately 1½ hours each, supplemented by other language aids.

E. Field Work in Israel - 100 hours

Special trips will be organized to improve the trainees' knowledge of Israel and of needs and services. This will include field work in connection with group projects and time required for brief "internships" in various settings (Agency departments, absorption centers, accompanying missions et al).

(The time allotted is in addition to such field trips as may be made in connection with any of the above courses, which time is already included in the hours allotted to these courses.)

F. Individual Projects - 100 hours

Each trainee will be required to undertake a specific project. This is intended to give the trainee intensive knowledge in at least one particular area, and at the same time give him experience in organization of material exposition.

The hours allotted also allow for individual trainee conferences with faculty advisors.

* * * * *

5. Some Thoughts about Field Placements for Trainees

The following will summarize our discussions (Chinitz, Rosen, Shaham) on the issues to be raised in relation to placement of Center graduates in field work assignments.

/....

We agreed that there are certain general principles and conditions which should govern field work assignments, to wit:

-- The time period should be at least two months, preferably three months, immediately following the close of the Jerusalem training course. It is assumed that these months -- April, May, June -- will permit participation in active campaigning in enough places to assure adequate assignments.

-- Graduates should be assigned preferably to places other than those in which they will have their permanent employment.

-- There must be assurance of adequate local supervision. Practically speaking, this means that a condition of placement should be that the supervisor in the local campaign organization be willing and able to allot adequate time to supervision of his trainee.

-- Feedback to the Training Center is essential. This should consist of (1) reports by the supervisor; (2) reports by the trainee; (3) site visits by the Center director.

It is assumed that the employing organization will pay the salary and expenses of the trainee in his field placement. However, this assumption should be checked out. (After all, if the trainee is rendering service to the community of his field placement, why should not that community pay at least part of the salary and/or expenses? It is an accepted principle of field placement.)

From the criteria stated above and the practical problems of communications and travel, it would appear that four countries lend themselves best for field placements: United States, Canada, England, France. France may pose some language problems (which would have to be overcome in any event, if France is to use the Training Center as a source of personnel).

It would appear, then, that the Center Director, in his early explorations will have to ascertain not only how many candidates, and therefore how many jobs, are assured, but also how many communities are prepared to accept trainees for field placements under the conditions cited above.

/....

Coming back to the issue of supervision, and this could apply also to helping us get field placements, I would suggest we consider the possibility of local advisory or cooperating committees of professionals, possibly professionals and lay leaders. This would be indispensable in the United States and Canada because of size, but it could be applied even to England and France. In other words, such a committee in each country would assist the Center in finding candidates, including assuring jobs; screening candidates; finding field work placements; assisting in supervision (this last only for professionals) and feedback to Jerusalem.

Another important issue to be raised is the role of National UJA and of Keren Hayesod in accepting candidates for field placement, including the responsibility for assuring field assignments.





UNITED JEWISH APPEAL

ON BEHALF OF UNITED ISRAEL APPEAL, JOINT DISTRIBUTION COMMITTEE, NEW YORK ASSOCIATION FOR NEW AMERICANS

1290 AVENUE OF THE AMERICAS, N. Y., N. Y. 10019

CABLE ADDRESS: UJAPPEAL, NEW YORK

July 21, 1972

Dear Herb:

I have just completed a series of meetings with Zonek Shaham, who as you know, will be the Director-General of the Fundraising Institute, and Irving Kessler, of Hartford, who is leaving for Israel for one month to help Shaham get the Institute started.

The target date is mid-November, although I doubt if they will succeed in getting everything in line by that time.

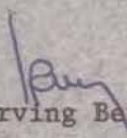
I understand that Harry Rosen and Zonek both spoke to you regarding your participation in the Institute. I told Zonek that it is my hope that you will be able to play a key role in the fundraising in the Institute. In view of the background of the Institute, I really wouldn't blame you if you said that you wanted no part of it.

However -- you are a damn good teacher with an unusual sense of discipline as to concepts and detail, especially in the field of fundraising and therefore, you can add a dimension to the course which is unique.

I hope, therefore, that you will give Shaham your time, and teaching the subject very serious consideration.

Looking forward to seeing you soon.

As ever,


Irving Bernstein

IB:gh



THE JEWISH AGENCY FOR ISRAEL
INSTITUTE FOR LEADERSHIP DEVELOPMENT

הסוכנות היהודית לישראל
המכון לפיתוח מנהיגות

March 3, 1976

Rabbi Herbert Friedman
Hebrew Union College
Jerusalem

I am really sorry that I could not be at last Friday's interview. I've been enjoying our meetings so very much and I was really looking forward to last Friday's series of stories. I sent my regrets via the secretay at the H.U.C. which I hope you received. Anyway, I hope my work schedule will permit me to sit-in on the next interview session.

I have enclosed a copy of the tape of your talk with the group of 70 college students from Philadelphia. I've also enclosed for your reference, copies of the most recent programs in which the Institute has been involved. I would enjoy hearing your comments.

Hope all is well. I look forward to seeing you soon.

Warm regards,

Rosalie

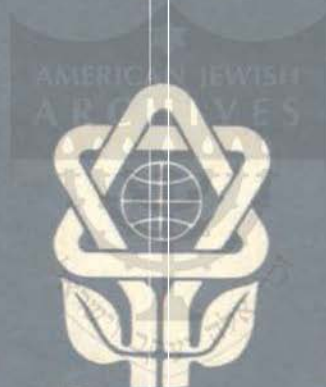
Rosalie Lurie

P. S. Shahan & Aloni also send their regards.

The Jewish Agency for Israel

הסוכנות היהודית לישראל

המכון
לפיתוח
מנהיגות



INSTITUTE
FOR
LEADERSHIP
DEVELOPMENT

JERUSALEM, P.O.B. 6001 * TEL. 531276

Dear Rabbi Friedman,
We wish to use the occasion of the New Year to thank
you for your contribution to the success of the seminar
for professional Fundraisers that took place this summer.
מיטב הברכות לשנה החדשה
And yes - we will
schedule more time שנת שלום בריאות ואושר
next time!

Best wishes
for a new year of
Peace Health & Happiness

AMERICAN JEWISH
ARCHIVES



Lea
Stern

Rosalie
Lurie

Aloni
Institute for Leadership Development,
P.O. Box 6001, Jerusalem, Israel.



ירושלים, ת"ד 6001 * TEL. 531276 *

5/8/35 - Sec.

(היבד) ז' ת"ר כב אלול א"ת

יד אסכמנה אתה אשר לבדך עומת מלכותך

[illegible]

אשר נאמר ואלה שמות המלכים אשר מלכו על ישראל

מחצית מן המלך ומהמלכה ומהבנותיה ומהאנשי ביתו ומהאנשי
המלכות ומהאנשי המלכות ומהאנשי המלכות ומהאנשי המלכות

בניקת, אהא בבע'ל ויקריבו אליו דיוה עז בבידו

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במלך ו. אברהם ה.

24^N 1

HERBERT A. FRIEDMAN

Henry Heller

6 4525

Marcus 12



LIST OF THE CHOSEN COMMUNITIES

The criteria of the sample selection were :

- the size of the Jewish community : over 150 000; 40 000 to 149 999; 10 000 to 49 999 and 1 000 to 9 999.
- the geographical distribution : East; Central; South and West.
- the amount per capita given to the U.J.A..
- the previous studies on the communities.

	East	Central	South	West
+ 150 000	Philadelphia (Pen) Boston (Massas.)	Chicago (Illinois)	Miami (Florida)	Los Angeles (Calif.)
40 000 to 149 999	Baltimore (Mari.) Pittsburg (Pen)	Detroit (Michigan) St Louis (Miss)		San Francisco (Calif)
10 000 to 39 999	Norfolk (Vir) Englewood (J) Central New Jersey Worcester (Mas) Framingham (Mass)	Milwaukee (Wisc) Kansas City (Miss) Cincinnati (Ohio)	Houston (Texas) Hollywood (Flor) Atlanta (Georgia)	Denver (Colorado) Phoenix (Arizona) Tucson (Arizona) Long Beach (Calif)
1 000 to 9 999	Harrisburg (Pen) Allentown (Pen) Wites barres (Pen) Fallsburg (N.Y.) Highstown (N.J.)	Des Moines (Iowa) Ft Wayne (Indiana)	Tulsa (Oklahoma) Portsmouth (Vir) Newport news (Vir) Memphis (Tenn)	Palm Springs (Cali) Santa Barbara (Cali) Monterey (Cali)

QUESTIONNAIRE ON THE JEWISH COMMUNITY STRUCTURE IN 1975

I. Population in the town :

Jewish population :

3. Number of Jewish organizations :

4. Number of members in the Jewish organizations :

5. Main organizations : name, number of members, activities...

6. Community activities : social and welfare services

7. Percentage of the Jewish population member of a synagogue :

% belonging to the orthodox community :

% " conservative :

% " reformist :

100 %

8. Number of members and activities of the Zionist organizations :

9. Percentage of Jewish born in the town :

" " " in the U.S.A. (but not in the town):

" " " foreign born : 100 %

Main countries of origin of the Jews :

10. Percentage of adults who have a Jewish education :

% from Sunday school :

% " Afternoon school:

% " all day school :

% " tutor, other... :

100 %

II. Percentage of the children registered in the Jewish school :

12. Number of Jewish students studying in the town :

13. Percentage of intermarriage :

14. Birth date of the community :

15. Main historical development and events of the community :

16. Background of the community ^{ad. service director} ~~professional leader~~ (age, profession, functions...) :

17. Name and functions of "jewish national leaders" native from the town :

18. Percentage of the Jews with an Income of less than £ 5 000 :

" " " from 5 000 to 15 000 :

" " " 15 000 to 25 000 :

" " " 25 000 to 50 000 :

" " " over than 50 000 :

100 %

19. Percentage of the Jews working as professionals :

" " " manager-proprietors :

" " " clerical- sales :

" " " blue collar :

100 %

20. Percentage of household with 1 person :

2 persons :

3 " :

4 " :

5 " :

6 and over:

100 %

21. Percentage of the Jews old of 0 to 24 :

25 to 44 :

45 and over:

100 %

22. Percentage of the adults with educational background , less than high school :

high school graduate :

college graduate :

post college (Univ.) :

100 %

23. Percentage of Jews married :

single :

widowed :

divorced- separated :

100%

24. Special links with Israel : family, business, number of tourists, immigrants....

25. Average income in the town :

26. Average income in the town of the professionals:

manager- proprietor :

clerical sales :

blue collar : _____

27. Special legislation for philanthropy or fund raising :

28. Do the Jewish give also to non Jewish organizations and figures

QUESTIONNAIRE ON THE FUND RAISING ORGANIZATION

For each of the last 10 years (1965 - 1975), we ^{would} like to get the following informations :

1. The U.J.A. cash receipts :
2. The percentage of the CJFNF - UJA campaign allocated to the U.J.A. :
3. The percentage of the receipts given by :

the 10 biggest donors

the 100 following ~~donors~~ biggest donors

the others

100 %

4. The percentage of the donors and of the receipts according to the size of the gifts :

I - 499 \$
500 - 999
1 000 - 2 499
2 500 - 4 999
5 000 - 9 999
10 000 - 24 999
25 000 - 49 999
50 000 - 99 999
100 000 - 249 999
250 000 - 499 999
500 000 - 999 999
1 000 000 and over

100 %

100 %

5. The number of volunteers and professionals :
6. Main stages and components of the last campaign :
7. Background of the U.J.A. representative in the community (profession, education -secular and jewish -, U.J.A. involvement - former volunteer from... to ..., professional ^{since} ~~from~~...-, community involvement - function...-,...).

from Herbert A. Friedman

MANOR Yohanan

% M^{me} MANDELSTAM

119 Rue Notre Dame des CHAMPS

PARIS

AMERICAN JEWISH
ARCHIVES

~~003~~

033-41-86



DALLAS TEXAS

QUESTIONNAIRE ON THE FUND RAISING ORGANIZATION
=====

For each of the last 10 years (1965-1975), we would like to get the following information

- 1/ The U.J.A. cash receipts:
2. The percentage of the ~~U.J.A.~~ campaign allocated to the U.J.A. :
3. The percentage of the receipts given by:
the 10 biggest donors
the 100 following biggest donors
the others

100 %

- 4/ The percentage of the donors and of the receipts according to the size of the gifts:

	1- 499 \$	% - #	% - Donors
500 - 999			
1 000- 2 499			
2 500- 4 999			
5 000- 9 999			
10 000- 24 999			
25 000- 49 999			
50 000- 99 999			
100 000-249 999			
250 000-499 999			
500 000-999 999			
1 000 000 and over			
		100%	100%

- ~~5. The number of volunteers and professionals* :~~
- ~~6/ Main stages and components of the last campaign :~~
6. Background of the U.J.A. ^{field} representative ^{to} in the community (profession, education - secular and jewish -, U.J.A. involvement - former volunteer from ... to ... , professional since ... -, community involvement - function ... -, ...).

* U.J.A. paid worker.

5. How did The National UJA assist above-named community in the 1975 campaign, ~~in~~ in early planning, suggestions, speakers, films, missions, providing lay leaders, etc.

QUESTIONNAIRE ON THE JEWISH COMMUNITY STRUCTURE IN 1975

1. Population in the town :
2. Jewish population :
3. Number of Jewish organizations :
4. Number of members in the Jewish organizations :
5. Main organizations : name, number of members, activities...
6. Community activities : social and welfare services ...
7. Percentage of the Jewish population member of a synagogue :

% belonging to the orthodox community :

% " conservative :

% " reformist :

100%

8. Number of members and activities of the Zionist organization :

9. Percentage of Jewish born in the town :

" " " in the U.S.A. (but not in the town) :

" " foreign born :

100%

Main countries of origin of the Jews :

10. Percentage of adults who have a Jewish education :

% from Sunday school :

% " Afternoon school :

% " all day school :

% " tutor, other... :

100%

11. Percentage of the children registered in the Jewish school :

12. Number of Jewish students studying in the town :

13. Percentage of intermarriage :

14. Birth date of the community :

15. Main historical development and events of the community :

16. Background of the communal service director (age, profession, functions...) :

17. Name and functions of the "Jewish national leaders" native from the town :

18. Percentage of the Jews with an income of less than \$ 5 000 :

19. " " " from 5 000 to 15 000 :

" " " 15 000 to 25 000 :

" " " 25 000 to 50 000 :

" " " over than 50 000 :

100%

19. Percentage of the Jews working as professionals :

" " " manager-proprietors :

" " " clerical-sales :

" " " blue collar :

100%

20. Percentage of household with 1 person :

2 persons:

Percentage of household with 3 persons :

4 persons :

5 persons :

6 and over: _____

100%

21. Percentage of the Jews old of 0 to 24 :

25 to 44 :

45 and over : _____

100%

22. Percentage of the adults with educational background, less than high school :

high school graduate :

college graduate :

post college (univ.) : _____

100%

23. Percentage of Jews married :

single :

widowed :

divorced-separated : _____

100%

24. Special links with Israel : family, business, number of tourists, immigrants

25. Average income in the town :

26. Average income in the town of the professionals :

manager-proprietor :

clerical sales :

blue collar : _____

27. Special legislation for philanthropy or fund raising :

28. Do the Jewish give also to the non Jewish organizations and figures :

LIST OF THE CHOSEN COMMUNITIES

The criteria of the sample selection were:

- the size of the Jewish community: over 150 000; 40 000 to 149 999; 10 000 to 39 999 and 1 000 to 9 999.
- the geographical distribution: East; Central; South and West.
- the amount per capita given to the U.J.A..
- the previous studies on the communities.

	East	Central	South	West
+150 000	Philadelphia (pen) Boston (Massas.)	Chicago (Illinois)	Miami (Florida)	Los Angeles (Calif.)
40 000 to 149 999	Baltimore (Mari.) Pittsburg (Pen)	Detroit (Michigan) St Louis (Miss)		San Francisco (Calif)
10 000 to 39 999	Norfolk (Vir) Englewood (J) Central New Jersey Worcester (Mas) Framingham (Mass)	Milwaukee (Wisc) Kansas City (Miss) Cincinnati (Ohio)	Houston (Texas) Hollywood (Flor) Atlanta (Georgia)	Denver (Colorado) Phoenix (Arizona) Tucson (Arizona) Long Beach (Calif)
1 000 to 9 999	Harrisburg (Pen) Allentown (Pen) Hites Barres (Pen) Fallsburg (N.Y.) Highstown (N.J.)	Des Moines (Iowa) Ft Wayne (Indiana)	Tulsa (Oklahoma) Portsmouth (Vir) Newport news (Vir) Memphis (Tenn)	Palm Springs (Cali) Santa Barbara (Cali) Monterey (Cali)