



THE JACOB RADER MARCUS CENTER OF THE
AMERICAN JEWISH ARCHIVES

MS-763: Rabbi Herbert A. Friedman Collection, 1930-2004.

Series H: United Jewish Appeal, 1945-1995.

Subseries 2: Correspondence, 1947-1982.

Box
27

Folder
11

Zuckerman, Paul. 1972-1973.

For more information on this collection, please see the finding aid on the
American Jewish Archives website.

He.

UJA
FROM THE
GENERAL
CHAIRMAN

M E M O R A N D U M

March 27, 1972

To: UJA National Officers
From: Paul Zuckerman
Subject: Agenda -- UJA National Officers Meeting,
Monday, April 17, 1972

A G E N D A

NATIONAL OFFICERS MEETING
UJA OFFICE -- NEW YORK, N.Y.

12:00 NOON to 3:00 P.M. -- Monday, April 17, 1972

1. Campaign
 - a) Status and Projection
 - b) Problem Gifts
 - c) Problem Cities
2. Cash
 - a) Status and Projection
 - b) Special Efforts
3. Williamsburg Retreat Agenda
4. 1973 Campaign Planning
 - a) Prime Minister's Mission
 - b) Study Conference
 - c) Operation Israel

Paul

UNITED JEWISH APPEAL, INC.
1290 AVENUE OF THE AMERICAS
NEW YORK, NEW YORK 10019

M E M O R A N D U M

March 14, 1972

CONFIDENTIAL

To: UJA Executive Committee

Re: Notes on UJA Executive Committee meeting, March 3, 1972, at the Americana Hotel in New York. Mr. Paul Zuckerman presided.

The following were present:

Albert B. Adelman	Donald H. Klein
Frank Beckerman	Morris L. Levinson
Leonard D. Bell	Joseph M. Mazer
Donald H. Benjamin	Ernest W. Michel
Charles J. Bensley	C.M. Newman
Irving Bernstein	James H. Nobil
Philip Bernstein	Albert Parker
Louis Broido	Martin Peppercorn
Lawrence M. Cohen	Raymond G. Perelman
Melvin Dubinsky	Bert Rabinowitz
Raymond Epstein	Joshua Pratt, head Israel's Eastern European Desk at N.Y.C. Consulate
Max M. Fisher	Donald M. Robinson
Larry M. Frank	Morris Rodman
Herbert J. Garon	Malcolm M. Rosenberg
Charles Ginsberg, Jr.	Alan Sagner
Edward Ginsberg	Leonard R. Strelitz
Louis S. Goldman	Laurence A. Tisch
Bram Goldsmith	Gordon Zacks
Alexander Grass	Philip Zinman
Samuel L. Haber	Paul Zuckerman
Gottlieb Hammer	
Merrill L. Hassenfeld	

Mr. Zuckerman opened the meeting by calling on Mr. Joshua Pratt for a review of the current status of the emigration of Jews to Israel from the Soviet Union.

IMMIGRATION Mr. Pratt, director of Israel's East European Desk in the United States, reported as follows:

Between December 1, 1971 -- when the Soviet Jewish influx began dramatically to increase -- and March 1, 1972, a total of 8,022 have come to Israel. The month-by-month breakdown is -- December - 3,000, January - 3,060. February - 1,812. On March 1, 150 Soviet Jews arrived, and as of the date of this meeting 150 were awaiting embarkation from Vienna. The February decline was ascribed to the fact that, in Soviet offices where emigrants' papers are processed, this was a period for preparing annual reports and for vacations. In addition, it was a period of stepped-up propaganda against emigration from within the Soviet Union and from Soviet embassies in other countries.

This propaganda obviously has had little effect on Soviet Jews desiring to leave. As far as is known, some 60,000 of them are waiting for exit visas. Last month alone 6000 affidavits from Israel, required for emigration, were sent to the Soviet Union. Therefore, this emigration is expected to maintain itself as a massive influx increasing again in March and continuing at a rate of 2000 to 3000 a month. Even the 1800 that came in February would have been considered an unexpectedly high number for a single month not very long ago.

In the midst of the recent Soviet propaganda flurry, 105 Soviet Jews courageously signed a petition requesting an interview with the newspaper Izvestia to explain the special problems of Jews in the Soviet Union and why many want to leave, and to clarify the issues involved in Arab-Israeli conflict.

In response to inquiries, Mr. Pratt emphasized that, with sufficient support from abroad, more than 30,000 Soviet Jews can still be expected to enter Israel this year. He said a Russian official is reported to have commented that his country would not cut off emigration -- it would be stopped by the problems of absorbing immigrants. Mr. Pratt expressed his confidence that these problems, though they loom gigantically, will be overcome as a result of the understanding and response of American Jewry.

BOARD OF GOVERNORS MEETING Mr. Fisher, the Chairman of the Board of Governors of the Jewish Agency, reported on the Board's February meeting in London. He commented that the understanding and application shown by leaders of Jewish communities all over the world was most heartening.

A budget of \$775,000,000 for the year ahead was projected at the Jewish Agency meeting, most of the increase to cope with costs of this year's anticipated immigration of 70,000. Housing needs -- the major item -- were projected at \$300,000,000. Additionally, there are neglected needs of the existing population to be met. Mr. Fisher said it is hoped "to get 4,600 youngsters -- mostly of North African origin -- off the streets" into kibbutzim and youth hostels. Some oriental Jews and young couples require appropriate living quarters and improved conditions. This situation cannot be ignored for long; in time it could become explosive.

Fulfilling the Jewish Agency budget will require record campaigns by Keren Hayesod in countries abroad as well as by the UJA in the United States. For 1972 these campaigns are currently running 30 per cent ahead of last year -- about the same rate of increase as the UJA's. In addition, it was agreed for the first time that countries other than the United States would participate in loans for the Jewish Agency.

Among new "ground rules" laid down for the Jewish Agency, the Board of Governors decided the Agency will not undertake any project not directly related to its activities which can be handled by private enterprise. Mr. Fisher stated his belief that, with the "whole Jewish world" working together within the format of the recently reconstituted Agency, more will be accomplished than ever before.

The Board's meeting in London included sessions of its Fund-Raising Committee, of which Mr. Edward Ginsberg is Chairman. Mr. Ginsberg noted the Committee's aim is to find ways, collectively, of raising more money throughout the world Jewish community. It was agreed in London to set up a fund-raising Institute in Israel for the training of UJA and Keren Hayesod fund-raisers. It is hoped to have the Institute in operation by the end of the year, directed by an Israeli with an American associate. Although initially accepting only professional fund-raisers, plans call for the Institute eventually to include lay leaders as well. After a two-to-three month instructional period in Israel, trainees will "go into the field", working in campaigns of the UJA and other fund-raising arms of the Jewish Agency. In addition, for the cross-fertilization of techniques and ideas, arrangements will be made to exchange fund-raisers between communities in this country and abroad.

In the ensuing discussion, it was proposed that consideration be given to a year-round solicitation-training program for community campaign workers in this country. Mr. Philip Bernstein pointed out that such a program already has been initiated in 70 communities. Mr. Irving Bernstein indicated that the UJA and CJFWF are seeking, under their combined auspices, to broaden and extend this program.

SPLINTER CAMPAIGNS FOR SOVIET JEWS The Executive Committee members were presented with a list of groups other than UJA constituent agencies which are, or have been, sponsoring direct assistance for Soviet Jews. Mr. Irving Bernstein observed that separate fund-raising by these groups has not seriously competed with community campaigns for the UJA. However, he, Mr. Philip Bernstein, and Mr. Isadore Hamlin, Executive Director of the World Zionist Organization-American Section, have been engaged in joint efforts to keep the situation under control. They have held meetings with representatives of these organizations, and in some cases an understanding has been reached on the basis of the December 16, 1971 statement of the Committee on Control and Authorization of Campaigns of the WZO-American Section, which urged American Jews to channel all aid to Soviet Jewry through the UJA.

Mr. Haber pointed out that assistance to Jews in the Soviet Union has, in the main, been provided through the JDC Relief and Transit Program without publicity, which might harm or inhibit the work being done. The JDC budget for the program this year is more than twice the amount in 1971.

ISRAEL BONDS Mr. Irving Bernstein indicated an understanding also had been reached recently with regard to Israel Bond organization publicity which seemed to blur the distinction between the needs to be met by UJA-raised funds and Bonds proceeds. Appreciation was expressed for the cooperation of both Sam Rothberg and Leo Bernstein in this matter.

CAMPAIGN REPORT Mr. Zuckerman reported that, with about one-third of the 1972 campaign completed, \$131,379,524 had been raised as of March 1 compared to \$101,495,568 in last year's values and representing an increase of about 30 per cent. He commended the UJA leadership for "showing what can be done" by their campaign efforts so far, but stressed that continued hard work is necessary to maintain the pace. Mr. Irving Bernstein commented that proceeding in a deliberate fashion with person-to-person solicitation of big gifts has contributed in large part to the campaign's effectiveness. Mr. Zuckerman noted that efforts must now be concentrated on the great bulk of middle-sized and smaller contributors who remained to be solicited.

Operation Florida Mr. Leonard Strelitz said that this Operation was preceded by a UJA staff analysis which indicated there were several potential new six figure gifts in a number of Florida communities. Some of these potential gifts had previously been indicated in "Operation Breakthrough" project research. On February 8 a solicitation team consisting of Leonard Strelitz and Aryeh Nesher, accompanied by UJA field representative Leon Rossen, made visits which achieved the following results:

In Winterhaven, a gift of \$375,000 was obtained from a prior \$2,500 contributor. In Clearwater -- in view of the possibility of a \$1,000,000 gift -- a pledge which could have been closed at a lesser figure was kept open (the contributor involved will visit Israel on March 21). In St. Petersburg, a contributor increased to \$35,000 from \$22,500.

In Tallahassee the next day, two additional \$35,000 pledges were obtained -- from contributors who gave \$250 and \$1,250 respectively in 1971. These gifts are expected to stimulate further improved giving in Tallahassee.

Mr. Strelitz advised that similar operations were planned in Georgia, Texas, Connecticut and New York State. He urged other Executive Committee members to go into these areas as solicitors.

He also urged cooperation in the overall efforts of Operation Breakthrough. Research on potential new large contributors has produced a list of 300 names with pertinent background information in each case. This list has now been broken down by communities and states for the review of Executive Committee members. Mr. Zuckerman praised Mr. Strelitz for his chairmanship of this effort and for the Florida results. He commented that the list represented the most potentially productive research job ever done for the UJA, and that it was important for Executive Committee members to follow-through on this resource.

Mr. Nobil reviewed Operation Upgrade which is a program of individual solicitations by lay leaders to increase gifts in the \$1,000 to \$10,000 range. Mr. Bell is program Chairman, and Mr. Nobil is co-Chairman. With a group of young leaders they tested the program as a pilot project in 17 communities in 1971. Mr. Nobil noted that they intend to operate in 50 communities in 1972 with the cooperation of community leadership and executive directors. He pointed out that this program can significantly broaden the base of campaigns, and the Executive Committee members were asked to foster its further acceptance in the communities.

Operation Israel Mr. Goldman, as Chairman of this project, thanked his co-Chairman, Mr. Gerald Colburn and reported that on the 11 flights in the 1972 series, a total of \$3,503,173 was pledged for 1972 compared to \$2,369,705 in 1971 values. A total of 1,390 people participated, compared to 1,368 in the previous year's series. He indicated that for 75 per cent of those participating this year, the trip was their first visit to Israel.

A review of all statistical information and supplementary reports on Operation Israel 1972 produced a consensus among Mr. Goldman, Mr. Colburn and UJA management staff concerned with the mission program on the following recommendations for 1973:

That community short term (two or three day) small missions for big givers, patterned on the recent Baltimore mission, be introduced into the overall Mission program and actively promoted by the Campaign Department as a major campaign tool;

That recruitment of a full roster of National Chairmen as Operation Israel Mission Chairmen be pursued and completed as early in the calendar year as possible;

That the 1973 Operation Israel schedule be largely for couples;

That a minimum gift be established as qualification for participants on Operation Israel.

That - since it has been difficult to fill flights during the months of December and February - Operation Israel missions be scheduled primarily in November and January;

That the size of Operation Israel missions be limited, possibly to one planeload, or to a maximum of six buses, because larger-sized trips make effective solicitation contacts difficult.

West Coast Mr. Zuckerman observed that Los Angeles campaigns have been pace-setters for the rest of the country, under the direction of leaders like Edward Sanders, Chester Firestein -- and Bram Goldsmith, whose responsibility as UJA National Chairman includes the Western States.

Reporting on this year's Southwest regional meeting in Phoenix, Mr. Goldsmith said that it is having a continuing impact on campaigns in the area. The 60 community leaders who attended -- federation presidents, campaign chairmen and community executives -- showed an encouraging eagerness to learn what needed to be done and how to do it. Thirteen solicitations now completed in the area have produced \$635,000 in pledges from contributors who last year gave a total of \$124,000. A regional meeting is now planned for the northern tier of Western States.

Mr. Goldsmith commented that it might be a good investment for the UJA to do more in the way of maintaining year-round relationships with local leaders and substantial contributors.

\$50,000 Minimum Gifts Mr. Adelman, the UJA National Chairman with directive responsibility for gifts in the \$50,000 and over category, observed that solicitation for 1972 began on the first Prime Minister's Mission in August. Although a substantial number of large pledges had been obtained in the intervening period, about 100 gifts of \$50,000 and over remained to be solicited. Cards indicating solicitation assignments from among these open gifts were distributed at the meeting to Executive Committee members. Urging their fullest cooperation in helping to solicit the gifts, Mr. Adelman said that he or Mr. Peppercorn should be consulted by those seeking further information or assistance with the solicitations. He added that, if necessary, he was prepared to accompany "anyone to any place" to aid in the solicitations.

Young Leadership Mr. Benjamin, Chairman of the Young Leadership Cabinet, reported on some of the Cabinet's activities as follows:

Large scale participation in Operation Upgrade.

"Think Tank" meetings in December to consider how to meet the challenge of increased Soviet Jewish immigration, and more recently the psychology of fund-raising in terms of approaches to sustain a long-run positive response to overseas needs in the American Jewish community.

A pilot program to pick out cities which may be heading for trouble with their campaigns and trying to be of help in preventing it.

Seeking ways of reaching even more of the young leaders between the ages of 25 and 40 in the American Jewish community than the 13,000 already part of the UJA's young leadership organization.

RESULTS FROM FEBRUARY EVENTS It was reported that 130 cities participated in the closed circuit radio broadcast on February 6, and that it reached over 12,000 individuals at meetings in these cities. This was the largest closed circuit program of its kind ever arranged. The majority of communities involved in this broadcast felt that it had a positive effect on the campaign. All of them (with the exception of Washington, D.C., which had trouble with its local line) had good to excellent reception, so that from a technical standpoint the set up and execution of the network was very successful.

Action at the meetings included fund-raising; the adoption of resolutions aimed at meeting the needs of Soviet Jewish immigrants; raising of goals previously set, or reevaluating campaigns. Tapes of the broadcast will be utilized at additional meetings scheduled for the campaign. The views of Executive Committee members are sought on their reactions to the broadcast and whether or not this procedure should be used again as a campaign instrument.

Mr. Zuckerman said that, on the date of the national closed circuit broadcast, a meeting also was held with representatives of the Conference of Presidents of Major American Jewish Organizations. It produced a resolution charging each of the member organizations to sensitize its membership to the critical needs stemming from the extraordinary new immigration to Israel -- and to exert every effort to secure total membership participation in the current United Jewish Appeal "by giving the maximum of their time, effort and substance." New York City UJA has appointed a staff member to work full-time on a local basis with Jewish organizations in implementation of this resolution. The Executive Committee members were urged to stimulate similar efforts in other communities.

Mr. Irving Bernstein noted that, as a further result of efforts in February, UJA-oriented speakers will be included on the programs of the 80 rallies to be held in April on the National Conference on Soviet Jewry's Solidarity Day. It was also reported that the forthcoming edition of the Conference's "Matzah of Hope" statement for Passover would, for the first time this year, include a message on behalf of the UJA. Arrangements will be made for the million names sought for Solidarity Day petitions to be turned over, with addresses, to communities for gift solicitation follow-up.

A detailed plan of action in support of local campaigns was adopted at the four regional meetings of the American rabbinate during the week of February 14. These meetings included the participation of Israeli Minister of Immigration Natan Peled, Herbert Friedman and Rabbi Joseph Ehrenkranz, Chairman of the UJA's Rabbinical Advisory Council. Attendance at these meetings was as follows:

New York City	--	185	rabbis,	21	congregation	presidents
Chicago	--	86	"	, 17	"	"
Los Angeles	--	68	"	, 19	"	"
Miami	--	32	"	, 4	"	"

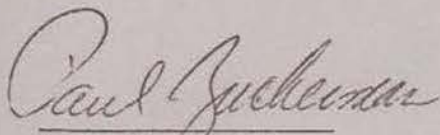
It was indicated it could be helpful if UJA national leaders would initiate and urge appropriate follow-up by federations and welfare funds with congregational leaders, including passage of 100 per cent campaign support resolutions by synagogue boards, and special temple services concerning Soviet Jewry on Friday evening, March 24 (the sabbath preceding Passover).

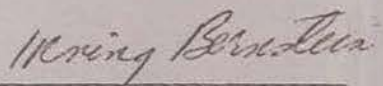
NEW YORK CITY Mr. Levinson reported that the New York City UJA campaign had raised \$26,000,000 for 1972 to date, representing a 34 per cent increase over last year's values of \$19,500,000. He said a great deal of effort was now being concentrated on broadening the base of the New York campaign. It was expected that this effort would be furthered by regular contact with representatives of local Jewish organizations to assure implementation of the Conference of Presidents' resolution. In the area of finding new big gifts, Mr. Levinson said the New York UJA would be following up on "Operation Breakthrough" research to the fullest extent possible.

CASH Mr. Zuckerman reported that, as of March 2, the UJA had received a total of \$33,673,033 in cash for the year 1972, compared to \$26,370,846 raised over the comparative period of last year. He stressed that a large, continuing flow of cash was particularly required this year, with the ultimate aim of realizing a total of \$300,000,000 by year's end. Executive Committee members were asked to press for intensive and continual cash collection efforts in their own communities. Because of the special importance of exemplary action by national leaders, Executive Committee members with outstanding gifts will be systematically consulted about working out procedures for rapid payment of their pledges.

Before the meeting's close, Mr. Philip Bernstein urged a concerted effort to make the passionate concern for Soviet Jewry among American Jews a passion for giving as well.

Mr. Zuckerman expressed appreciation to everyone for attending and adjourned the meeting.


Paul Zuckerman
General Chairman


Irving Bernstein
Executive Vice-Chairman

NOTES ON MEETING ON "PROJECT POTENTIAL"

UJA NATIONAL OFFICE

May 3, 1972

Participants: Bert Rabinowitz, Irving Bernstein, Martin Peppercorn,
Marc Tabatchnik, Melvyn Bloom, Donald Klein, Herman Rosen.

Name of Program: Various names for a program involving approaches to problem cities were suggested at the meeting, and there was agreement with Mr. Rabinowitz' proposal that it be called "Project Potential".

Activation of Project: Consideration was given to whether the criteria for a program, as drawn up at the April 28 meeting on this Project, might produce tangible short-range results in communities in addition to long-range possibilities. It was agreed the program, with some implementation and tightening, could, if limited at the start to a reasonable number of cities, be of great benefit to the UJA and the cooperating communities; at this point, communities with especially complex situations should not be included in this program. The consensus was that a committee composed of a small number of Executive Committee members should be formed to consider practical approaches to three specific communities --- one large, one medium-sized, one small --- at the Friday and Saturday morning sessions of the Williamsburg Retreat.

Community Selection: Mr. Peppercorn presented a list of 29 cities. These were narrowed down in discussion to Cincinnati, Philadelphia (large cities); Buffalo, Memphis and New Orleans (medium-sized); Fort Lauderdale, West Palm Beach, Teaneck (small). Philadelphia was viewed as too large an assignment "for the first time around". It was noted that Florida communities should be approached in terms of a state-wide situation, and that a committee was being set up to do that at the Retreat. New Orleans was cited as having the most immediate potential of the medium-sized cities. On the basis of the discussion and their geographical distribution, the cities selected were Cincinnati, New Orleans and Teaneck.

Committee Selection: It was agreed that, for the sake of objectivity, it would be best to have leaders on the committee concerned with this Project who are not from cities involved, but who have had experience in dealing with community structure problems. However, some might have contacts in the problem cities which could prove helpful. The indicated attendance for the Retreat was reviewed in the light of these points, as well as other matters to be taken up in simultaneous committee meetings at Williamsburg. It was agreed the Project Potential committee should consist of 7 to 10 members, subject to the approval of Paul Zuckerman.

.....

Problem Measurement: At the previous meeting, a series of tentative criteria were developed for a model fund raising city against which problems in a city with difficulties might be measured. The tentative criteria were reviewed against the situation of an actual large city, as an initial test of their validity in the preparation of profiles for the Project committee. As a result of the review, the criteria were revised as follows:

1. A viable, strong lay leadership - one whose giving is viewed as maximum, whose personal activity shows deep involvement in the community and the campaign; whose continuity of interest and activity is strong.
2. A broad base of leadership at all levels, and a well-planned ongoing program for leadership development.
3. A feeling of pride in accomplishment.
4. Communal response to programs and goals keyed to the national UJA effort.
5. A broadly oriented leadership concerned with both national and local aims, overseas developments and visits to Israel.
6. A strong and respected central organization which is the main address of the Jewish community.
7. Strong professional leadership.
8. A broadly based campaign organization, involving Trades and Professions, Young Leadership, Women's Division, Students, Rabbis, etc., which works conscientiously to reach the entire Jewish community.
9. A well developed system of local services in which involvement of community leadership complements the campaign -- and in which concern for particular projects does not limit overall campaign involvement.

Profile Preparation: In consultation with Mr. Peppercorn, Mr. Tabatchnik and Mr. Bloom will work with Public Relations Staff member Leon Aaron on developing drafts of analytical profiles of Cincinnati, New Orleans and Teaneck, based on these criteria, and available campaign data. Profiles will include community histories and detailed description of problems, to stimulate discussion at Williamsburg toward their resolution. An effort will be made to distinguish between problems which the community must handle itself, and those more susceptible to resolution with help from outside.

Completed versions of the profiles will be mailed for study on May 22 to those Executive Committee members who will deal with this Project at the Retreat. Staff will explore the possibility of providing Mr. Rabinowitz with profiles in graph form, rating the communities against the model city criteria on a scale of one to ten, for use at his discretion as chairman of the Williamsburg sessions on Project Potential.

#####

HAR

LETTER SENT TO CAMPAIGN CABINET

September 14, 1972

In the light of the recent cynical Soviet action in establishing extortionate exit fees for Jewish academicians appealing for visas to Israel, the words of Professor John Armstrong last June in Williamsburg about the uncertain course of Jewish life in Russia and the potentially explosive dimensions of Jewish emigration from there, have now become prophetic. During my recent visit to Israel I found that Armstrong's message, which some Committee members found controversial, has been quoted not only by Louis Pincus but by others in Israel who are concerned with this major aspect of immigration. This prophetic address is being sent to you under separate cover.

As you probably have heard, the Prime Minister's Mission returned from Israel on September 1 with a record achievement of pledges for the 1973 campaign. In the Knesset, in the presence of the Prime Minister, 132 men voluntarily pledged \$14,355,000 as compared with \$11,640,250 in 1972 values. Another 43 did not pledge at the meeting but gave every indication that their gifts for 1973 would be more than 1972. This is a clear indication that the Jewish community of America has reached a level of maturity which does not require war to stimulate large-scale giving to meet human needs and that we will not be frightened by threats of ransom and extortion.

It is clear that the tragedy at Munich has had greater impact on Jews and non-Jews alike than anything else that has happened to the Jewish people since June 1967. Five years ago on that fateful morning of June 5 we awoke with fear in our hearts that all would be lost and were overjoyed at the victory which meant continued survival. Last week in Munich we first toasted the false good news of survival only to taste later the bitter gall of total loss.

Since the Munich massacre there have been many efforts both nationally and locally to do something in behalf of those who died and of their families. We are trying to avoid such splinter campaigns and ask you to urge all those who wish to help to make their gifts to the Emergency Fund so that other Mark Slavins and Eliezer Halfins from Russia and Kehat Schorrs, Andre Spitzers and Yosef Gutfreunds from Rumania can come to freedom in Israel. One indication of the kind of impulse to give which has been provoked by the outrage at Munich is the gift of

up to one million dollars offered this morning to build a project in Israel memorializing the eleven Israeli martyrs through the Israel Education Fund.

I would appreciate your putting on your calendar a lunch on November 20 which will be the next meeting of the Executive Committee and Cabinet at which we will honor Ambassador Itzhak Rabin who will be leaving the United States to return home.

As we enter the New Year I want to wish you health and happiness and peace and an end to such tragedies as have recently befallen us at Lydda and Munich.

Sincerely,



Paul Zuckerman

PZ:DMS



UJA

FROM THE
GENERAL
CHAIRMAN

file

May 15, 1972

Dear Herb:

I believe you will be interested in reviewing the attached notes on the second meeting of Bert Rabinowitz' Project Potential Task Force. There will be a lay committee meeting on this subject in Williamsburg.

With kindest personal regards, I am

Sincerely,

Paul
Paul Zuckerman

PZ/Dcn
Enclosure



file

טל. 39261

U | J | A

המגבית | היהודית | המאוחדת

UNITED JEWISH APPEAL—Israel Office

October 16 1972

המשרד בישראל:
ירושלים ת.ד. 92 P.O.B. JERUSALEM

Rabbi Herbert A. Friedman,
United Jewish Appeal
Jerusalem.

Dear Herb, AMERICAN JEWISH

After carefully reading the transcript of your speech to the Women's Mission on October 8, I find it necessary to inform you that in view of your position as Executive Vice President of the UJA in Israel, you will in future adhere to the policies of the United Jewish Appeal, whenever you express yourself on behalf of the UJA, either individually or publicly.

Yours truly

Paul Zuckerman
Paul Zuckerman
General Chairman

TO CAMPAIGN CHAIRMEN AND \$10,000 AND OVER GIVERS WHO
WERE NOT STUDY CONFERENCE PARTICIPANTS

October 27, 1972

Dear Friend,

The UJA 1973 Study Conference was a unique emotional milestone in the relationship between Israel's people and the American Jewish community. For more than 300 of us who participated, it amounted to a rediscovery of ourselves -- in the words of the unforgettable song composed and sung especially for a 25th Anniversary presentation to the Study Conference - as "one people."

As a concrete expression of the deepened sense of solidarity we felt with the people of Israel, the valiant Jews of the Soviet Union and our brothers in need the world over, the Conference produced 116 announced pledges totaling \$12,025,000 as against \$8,750,000 in 1972 values. Included in these figures is the total of \$616,075 pledged by wives of participants meeting in separate caucuses, as against \$457,131 last year.

What I am hoping for in the 1973 campaign now is an extension of the spirit and productivity of the Study Conference. I look for it in both the level of participation and results of the Million Dollar Meeting on November 15 in William Levitt's house in New York, with Moshe Dayan. I particularly look for it in the vital Inaugural Dinner on December 7 at the Americana Hotel. The minimum gift for this dinner is the cost of saving one Russian Jewish family, or \$35,000. The success of this dinner can be a ringing declaration to the world, and particularly to the Soviet machine, of our determination to bring to freedom every Jew who yearns to be free. It is essential that all of us in America who are potentially capable of contributing at least that life-saving sum come to New York on December 7... and that we do all we can to get others there.

The Inaugural Dinner will give you an opportunity to experience for yourself one of the highlights of the Study Conference. The principal speaker will be Simcha Dinitz, Director General of the Prime Minister's Office, whose brilliant address to the Conference incisively put into perspective the problems facing our people during this fateful year.

With your participation, the Inaugural will be another triumph in our continuing drive to rescue our fellow Jews, an act of brotherhood to which the members of the Study Conference rededicated themselves in Israel. Knowing you share that rededication and want to act decisively on it, I look forward to seeing you on December 7.

Sincerely,

Paul Zuckerman

Paul Zuckerman

File

UJA
FROM THE
GENERAL
CHAIRMAN

December 27, 1972

Dear Herb:

The first meeting of the UJA Executive Committee in the new year will be held on Thursday, February 22, starting at 12:00 noon in Palm Beach, Florida. Mr. William Levitt is graciously making his yacht available for this meeting. Luncheon will be served.

Our meeting will be followed on the evening of February 22 with the national \$10,000 minimum gift dinner at the Palm Beach Towers which is planned as the climax of the full scale UJA solicitation program in Florida this winter. Please let me know as soon as possible whether you will attend the February 22 Executive Committee meeting and the dinner. In replying, please advise the time for your arrival so that hotel accommodations can be arranged for you accordingly. Spouses are cordially invited to the dinner.

As I previously indicated to you, our activities in Florida will begin with a memorable event -- a farewell luncheon by the UJA for Ambassador Yitzhak Rabin on Monday, January 22 at the Fontainebleau Hotel in Miami Beach. I hope you will also be there on this earlier date to honor the Ambassador who has represented Israel's people during an historic period for Jews everywhere and has won the warm friendship of all of us of the American Jewish community. If you can come down to Florida some time prior to January 22 -- and remain a few days beyond that date -- to participate in the Florida solicitation program, it would be of great assistance.

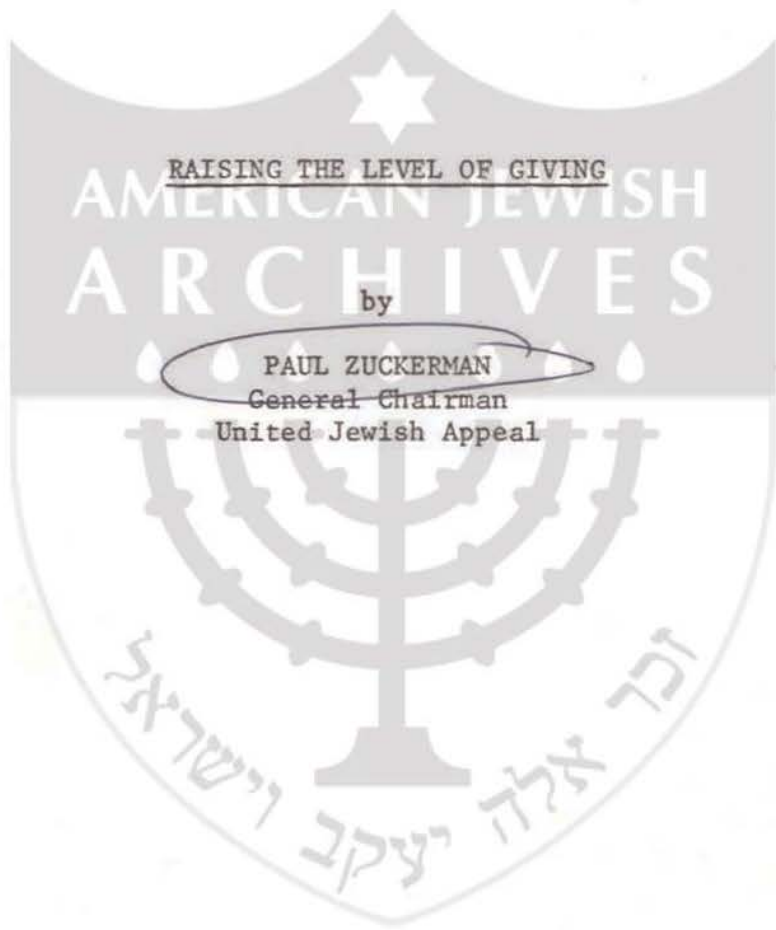
Looking forward to hearing from you, and with best regards.

Sincerely,

Paul Zuckerman

PZ:bga

file



International Conference of Chairmen
sponsored by the Fundraising Committee
of the Jewish Agency

London, England
November 27, 1972

Introduction

It is the intention of this paper to interpret the American Jewish experience in raising the level of giving to the annual United Jewish Appeal campaign by concentrating pragmatically on new programs initiated and traditional techniques deepened and refined in the process of solicitation itself since 1967-8.

In so doing it is not overlooking principles established or gains achieved prior to those years. Many of those principles are sound and remain useful. The fact, however, is that after the peaks reached in reaction to the crises which arose during that prior period (1947-8; 1956-7), there was a dropoff each time and the original peak was not retrieved. From the relatively shallow dropoff in the campaign of 1968 (which still raised more than twice as much as 1966), there has not only been recovery; the 1967 peak was surpassed by 1970, the campaign has continued to gain each year and will do so again in 1973 despite an uneven economy.

Nor is this presentation ignoring the fact that the level of giving is affected to some degree by many more elements than the programs and process of solicitation.

Some of these elements are beyond our power to control, chief among them being: (1) - events in the Middle East and elsewhere

involving Israel, Israelis and other Jews, the classic example being the Six Day War and its electrifying effect on giving; and (2) - the state of the national economy, which can inhibit or liberate giving.

Others are within our power to develop and utilize with a direct impact on giving: Jewish pride, identity and unity; the strength and effectiveness of each community's federation or welfare fund; lay leadership commitment, experience, sophistication and influence; increasing leadership involvement in solicitation, development of the community fund raising professional from a lightly regarded caretaker of a charitable enterprise to a widely respected expert in a life-building international endeavor, and the dynamic interaction of the two.

Still others are service elements which require sophisticated and intelligent application; speakers, informational material, publicity, audio-visual presentations for closed meetings and for mass communications media which are essential for campaign climate and support.

All of these elements influence the flow, tone, color and intensity of the campaign. In the end, however, it is only through the programs and process of solicitation that they can have any truly potent effect on levels of giving. In the final analysis, someone has to ask someone else for a sum beyond a level the prospect ever considered giving.

To do that successfully over the past five years, to raise the level of giving beyond 1967 and avoid the falloff which occurred after previous crises, we have had to take a long hard look at customary solicitational practices, discard those which would no longer work

and sharpen those which could work better - as well as develop a large number of new ones. This continuing process is designed to provide campaign workers in all categories of giving with: (1) productive solicitation procedures, (2) a fluid and efficient campaign mechanism and, (3) a strong calendar of programs and events. This is a dynamic mix and, in practice, the three components are in a constant state of interaction.

Basic Solicitation Procedures

Heightened giving calls for heightened opportunity for giving. Over the past five years we have developed six new or reoriented approaches to the basic techniques of solicitation which have been successfully stimulating maximum pledges:

*A pre-solicitation system of evaluating each potential gift, resulting in ratings which become an open, challenging part of all individual solicitations;

*Far greater emphasis on face-to-face solicitation of individuals, with public dinners and meetings used to confirm gifts rather than obtain them... or to train and stimulate workers, or to help create climate;

*Intensified concentration on obtaining exemplary increased gifts at the highest community or national level ... up to and beyond the million dollar level which was reached only rarely before 1967;

*A vastly expanded program of missions to Israel, creating opportunities for giving in response to living history and a direct experience of need;

*Use by communities of outside solicitors - Israelis, national

leadership, workers from other communities - to obtain greatly increased gifts from prospects at every level of giving;

*An active search for new sources of significant giving from affiliated individuals who were previously non-givers or undergivers.

The application of the last four of these new or freshened solicitation approaches will be fully described in the section of this paper dealing with campaign programs and events. The first two, representing significant departures from previous approaches, are generic to the implementation of all programs and the exploitation of all events in the interest of raising the level of giving. They are at the heart of the gains achieved in recent years and warrant separate treatment at this point.

Ratings

Until recently, openly stated ratings were rarely a part of the process of soliciting a gift to the United Jewish Appeal. The community campaign committee, evaluating a prospect, might arrive at a figure - usually protectively conservative and in line with year after year of modest increases which was the pattern of the pre-war era. It was probably not much higher than the prospect's own figure, which was naturally protective and did not necessarily reflect any increase at all. In any case, the two figures were tacit, unspoken, created no tension or dynamism, did not evoke bold upward movement. After a brief and comparatively tame solicitation dialogue, a modest increase (if any) was accepted; a few such "pace setting" gifts were obtained, announced at a meeting of contributors in that category of giving, most of whom had neither been

openly rated nor directly solicited and who were expected, when their cards were called, to follow the example of their "pace setting" peers and fall in line with proportionately modest increases.

The result of this approach was a succession of annual campaigns which advanced at a snail's pace, adding a few million dollars each year, a trend which was considered not only adequate but inevitable at the time.

The events of June, 1967, the record Emergency Fund campaign they created, the short falloff of the following year, the burgeoning needs of the people of Israel in the post-war period and the very real challenge and duty to regain and surpass the wartime peak changed all that. Solicitations could, in all conscience, no longer be approached with the restrictive attitude of "What will he give?" or "How little more will he give?" The question had to be - and aggressively - "How much more will he give?" Ratings had to be bold, maximum and openly stated. The solicitation dialogue had to be provocative enough to stretch the prospect's capacity beyond - hopefully, far beyond - his own conservative evaluation of it.

The rating system as developed in recent years and as applied in the solicitation process is this. Every gift in a community, down to the lowest figure which can be handled in direct solicitation by the force of workers available, is rated by evaluation committees in the various categories of giving. A self-evident rule of thumb is to avoid the old conservatism: not to ask for less than a maximum realistically attainable figure. The "safe" rating is counterproductive, even irresponsible. If there is any "error", it should be on the high side. The solicitor or

solicitors should have made the kind of increased gift the prospect is being asked to make; he is, in effect, being asked to care as much as the solicitor or soliciting team does.

The rating should be stated at the very outset of the dialogue. The prospect may be surprised, since, if it is a well-conceived rating, it will be considerably higher than he expected to give... but he is more likely to be flattered than irritated. Any resentment he may feel initially at the "pressure" it may represent will be neutralized when he is told that it is an evaluation by a committee of community leaders; in effect, the entire community has fixed his level of responsibility and is asking him to measure up to it. The rating then becomes the moving force, the active guideline in the solicitation. If the prospect does not respond with an offer at or acceptably near the rated figure, the solicitation is ended and resumed at a later date. When it is, the rating is intact; it is not negotiable. The inadequate gift must move up toward the rating; the rating never moves down to accommodate it.

The maximum, openly-stated rating is such a powerful tool that, in at least one major city, for well over half the cards covered, it is itself the entire process of solicitation. In this city, rated cards are handed out at pre-campaign meetings of workers in the various trade and industry divisions or levels of giving. The chairman asks those who accept their ratings to turn in their cards; the others will be seen later. The majority of cards are turned in and the meeting is over in minutes. A giant stride has been made toward raising the level of giving in that community.

Face-to-Face Solicitation

That kind of meeting is a far cry from the old standby previously

described, with a sampling of modestly increased pre-solicited gifts begetting even more modest increases (if any) from previously unsolicited and uncommitted contributors. Today, that pre-1967 pattern is largely dismissed with the first half of what has become a campaign truism: large meetings raise small money. The corollary second half, proven over and over again in recent campaigns, is that small meetings raise large money. The smallest meeting, and the one which raises the most money, is the direct, face-to-face solicitation.

Direct solicitation in its simplest form is one-on-one: a single worker who has himself made an exemplary campaign gift in the prospect's range asking him to match that action. For some prospects, solicitation by a team of two may be preferable. The second man may be another community worker or leader, an effective worker from another city, a national leader, a worker trainee or a personable and knowledgeable Israeli. He may take an active role, keeping the dialogue going at a brisk pace, or helping to answer questions or break down resistance. He may, on the other hand, be passive or even silent. Either way, his presence can make it seem as if the Jewish people, not just one man, is asking the prospect for a substantial and responsible gift.

In some communities, within the trade and industry divisions or among contributors at the various giving levels, the jump from large meetings to individual solicitations may be too sudden. In others, particularly the largest cities where much of the target population is widely separated and sprawled in suburbia, the worker force may simply be inadequate to cover a substantial number of cards on an individual basis. In these instances, as an interim tool, parlor meetings of small, highly

selected groups of like contributors can be almost as effective. For one very large city, this was the key campaign device used in 1971 and 1972 to change it from a clearly underachieving community to one which is beginning to move toward its true potential. Although ratings are not openly stated at these group sessions, they are made known to each prospect who is expected to stretch up toward it, as in the direct solicitation.

Improved Campaign Mechanism

The successful operation of the six level-raising approaches to solicitation in recent years has generated - and in turn been stimulated by - vastly sharpened national and community campaign organization. Leading examples of such honing processes used by communities to help shed unproductive old habits and release campaign energies to greatest effect are:

*an increasingly greater emphasis on planning and evaluation, often taking the form of a full staff and leadership retreat between campaigns for - (1) an in-depth analysis, in objective management teams, of the campaign just completed, and (2) formulation of plans and strategy for the coming campaign which build on the strengths revealed and attempt to eliminate the weaknesses...

*a greater and more widespread reliance on worker training, in a more structured form than ever before, to evoke exemplary giving and productive solicitation - most popularly in the form of a program made available by the Council of Jewish Federations and Welfare Funds which effectively uses group dynamics techniques ...

*active programs of new leadership development which aim to assure

continuity of sound communal structure and heightened campaigning by encouraging the emergence of talented young leaders and workers.

In this area of strengthening the framework of the overall campaign structure, national UJA:

*has pioneered the development of productive new talent with its ten year-old Young Leadership Cabinet, many of whose members through the years have become chairmen of campaigns, and virtually all of whom today are persistently active workers in the middle-level solicitation programs described in the next section of this paper...

*is providing worker training as an integral part of two of its new programs (Operations Upgrade and Breakthrough)...

*and is organizing a national program, called Project Potential, involving a concentrated leadership effort to analyze, evaluate and uplift the campaign operations of underachieving communities.

Programs and Events

The clear design behind the new solicitation approaches and the sharpened campaign organization -- to go after more and better gifts in every category with a greater, better-trained and more varied line-up of solicitors in the most favorable circumstances possible -- requires a dynamic and rationally structured calendar of programs and events. The calendar we have been developing over the past five years involves the following logical (and chronological) development:

*Commitment to increased giving by national leadership in the late spring of the year before each campaign:

*Concrete expression of that commitment in the late summer, in the

form of impressive pre-campaign top-level increases announced in the presence of the Prime Minister of Israel;

*Simultaneous establishment of the campaign goal, its adoption in early autumn by the central organization of the major federations and welfare funds and the acceptance by each community in October and November of its fair share;

*Continuation through the autumn months of the pre-campaign big gifts effort, pivoted on a nationwide leadership conference in Israel after the High Holy Days and culminating in a national inaugural dinner in New York in early December just prior to the formal launching of the campaign;

*Persistent efforts through the last four months of the calendar year to obtain a maximum number of announcements of gifts of one million dollars or more;

*All-out campaigning through winter and into spring at all levels of giving, using the full force of the improved operations and all possible combinations of the basic approaches, tools and techniques described above.

*Wrap-up and mass campaigning, into late spring.

In detail, here are the major things we do throughout the year to stimulate higher giving:

1. Annual Retreat of the United Jewish Appeal National Executive Committee. On the first weekend in June, the major policy-making body of the UJA assembles at a conference center far from urban and business pressures for an in-depth evaluation of the campaign which is about to close, an informed projection of the scale of the needs which will underlie the campaign ahead, and a full and frank discussion of the role each

member must play in that coming campaign as contributor and as worker. During all five years of these annual assemblies, the Executive Committee has proclaimed to the country the unanimous intent to make significantly increased gifts in the year ahead. In each case, this has served, firmly and ringingly, to set the tone of the ensuing campaign.

2. Prime Minister's Mission. Late in August, at the invitation of the Prime Minister of Israel, the Campaign Chairmen, largest contributors and professional directors of all communities raising \$1 million or more annually go to the transmigration center in Vienna for a day and to Israel for 2½ days - or directly to Israel for the 2½ days - to establish the credibility of rising overseas immigrant needs and the corresponding urgency of increased giving in the forthcoming campaign. For the past two years this has been a direct fund raising event, with each participant being solicited individually by a single assigned worker or team of two, and announcing his gift at a climactic session in the presence of the Prime Minister. The Mission of August, 1972, produced 132 pledges for the 1973 campaign totaling almost 14.4 million, as against about 11.6 million from the same contributors last year. This is the largest amount of money ever raised on any UJA mission.

3. Council of Jewish Federations and Welfare Funds Endorsement of Campaign Goal. In September, after the Jewish Agency budget of needs has been established and the UJA share assigned (for 1973, those figures are \$785 million and \$505 million respectively), the central body of the organized Jewish communities of America presents the national goal to its constituents for adoption. Each year this procedure has been in effect,

the endorsement has been unanimous. In this way, the American Jewish community at large publicly and officially agrees to raise considerably more money than in the previous year.

4. Program of Quota Setting Meetings. Through October and November, in an organized effort stimulated by the national United Jewish Appeal, the policy making boards or campaign committees of all major communities meet to consider quotas recommended by the national body as fair shares of the overall goal. In each case, the quota asked is higher than the amount raised in the past year and represents a stretching toward potential rather than a safe or conservative estimate of probability. The past record of acceptances - which is being repeated again this year - has come close to 100%, with the downward deviations being slight and with a number of communities adopting quotas even higher than asked.

5. Million Dollar Gift Program. The Six Day War of 1967 evoked 6 gifts of \$1 million or more to the Emergency Fund campaign initiated at that time. In previous periods, when the pattern of higher emergency giving followed by falloff prevailed and when the basic solicitation question was simply how much the prospect would give each year, we might have considered that an unusual, one time phenomenon and let it go at that.

In the years since the brief adjustment of 1968, when the pattern of unbroken raised giving has prevailed and the basic solicitation question has been how much more the prospect will give, we have pursued a conscious, determined, organized program of going after as many seven-figure gifts as we can possibly get. This is a vital part of our pre-campaign effort to obtain a maximum number of exemplary gifts of the highest category, and its success has had an electrifying effect on campaign tone and level. This is by nature a year-around program, although much of it is concentrated in the period between the September assignment of the national goal and the official opening of the campaign in early December. The climax of the program this year came on November 15, at a meeting of million dollar prospects in New York with Israel Defense Minister Moshe Dayan. At the conclusion of that meeting, gifts in this category to the 1973 campaign totaled 13 as compared with 12 for the full 1972 campaign. Of this number, 7 are repeated pledges at the seven-figure level - a not inconsiderable achievement - while 6 are first-time million dollar gifts, perhaps an even more notable development.

6. Concentrated Pre-Campaign Program of Big Gifts Solicitation.

In 1971, the last campaign year for which complete figures are available, some 4,300 gifts of \$10,000 or more, representing about 3% of the total number of gifts received, accounted for very close to 50% of the campaign total. From all indications, the proportion will be virtually identical for the 1972 campaign

when it is officially completed and tallied. Contributors in this range self-evidently constitute the UJA's major constituency, and it is on them that pre-campaign solicitation is concentrated.

The Prime Minister's Mission and the million \$ program previously described and the UJA Annual Study Conference, to be described below, have this year produced a total of more than 250 big gifts, out of the current total of 4,600 in this category. The ideal would be to open the campaign nationally in early December with all gifts of \$10,000 or more closed at a substantial increase, creating an irresistible campaign magnet drawing all other gifts upward. While this is manifestly impossible, the organized Jewish communities of America key their annual drives around their pre-campaign solicitations of these "initial", "advanced" or "pacesetter" gifts; using their own resources, national leadership, solicitors from other communities and from Israel to close the maximum number of big gifts at or near the ratings assigned.

It is expected that, in both number and value, big gifts closed before the national Inaugural Dinner on December 7 this year will reach record proportions. Perhaps even more important is the fact that virtually every one of these large contributors becomes in addition a key worker whose own giving is a powerful solicitation tool as he proceeds -- in the pre-campaign period and beyond, in his own community and elsewhere when called upon -- to approach other prospects rated at or near his level for corresponding increased giving.

.....

7. UJA Annual Study Conference. Its itinerary, logistics and fund-raising procedures organized by the national UJA, a gathering of \$20,000 minimum contributors and their wives spends eight days in Israel soon after the High Holy Days on a fact-finding survey of immigrant needs and UJA-funded programs designed to meet them. Sub-missions are also organized to other areas of Jewish need in the world, this year covering Vienna-Rumania and Iran. Sub-mission participants leave New York several days early, join the Study Conference on its arrival in Israel and report their findings. In this way what amounts to a global perspective on the need for increased giving is obtained. Gifts to the forthcoming campaign, solicited individually in the same manner as on the Prime Minister's Mission, are announced at strategically-timed caucuses. Last month's Study Conference produced 116 pledge announcements for 1973 totaling about \$12 million as against slightly less than \$9 million for 1972.

The 2½-day Prime Minister's Mission and the 8-day Study Conference, generating a combined total of about \$6 million in new money for a rise of 30% over 1972, represent vital early 1973 campaign power. They also serve as the archetypes for all other nationally-organized missions which are taking place during the pre-campaign period and which are scheduled for the campaign months ahead.

8. Top Level Community (Cameo) Missions to Israel. The campaign impact in a major community of leaders returning from either of the

large ^{national}missions -- deeply informed and moved by what they have seen, having made exemplary increased gifts and determined to work hard and productively in their campaigns - is great. Extending the mission program to create more such pivotal donor-workers for the communities is a natural development. Activated by a successful experimental mission conducted by Baltimore last year, a number of major communities are now assembling flights of a maximum number of their other largest contributors, both before and during their official campaigns. Using condensed (cameo) itineraries of 3-5 days arranged by national UJA and patterned generally after the Prime Minister's Mission, these communities, conducting solicitations and caucuses themselves, have registered consistent successes. Increases obtained last year and this by cameo groups have all topped the average national rise and touched off or consolidated outstanding local campaigns.

9. Operation Israel. Below the \$10,000 gift level, down to \$1,000, there is a fertile area to be worked in the interest of raising the level of giving. A contributor who pledges \$1,000 for the first time breaks a psychological and financial barrier and, in terms of numbers, lands squarely in the upper 20% of all givers who account for over 75% of the national campaign total. It is at this figure, in most sizeable communities, that he is separated from the mass of contributors - who are reached by mail and telephone only - and is solicited individually, directly and on a rated basis ... When he pledges \$10,000, he has reached another watershed mark in giving, clearly indicating a big gifts potential; upper level

programs are all geared to reach down and draw him into them as swiftly as possible ... Since the top 3% of gifts, the major campaign constituency, is so few in number and so vulnerable to depletion by death and leveling off, it is vital that it be constantly replenished and broadened. Dynamic upward movement within the \$1,000 to \$10,000 range is the best basis for this replenishment.

The Operation Israel program of missions modeled on the Study Conference -- six days for men, eight days for couples or women -- functions largely within this gift range and has been highly effective, amassing gains far exceeding the national average during all its five years of existence. Its trips are scheduled for the pre-campaign period from late October to early December and for the peak campaign weeks of January and half of February. It includes participants from the largest communities down to the smallest and from everywhere in the country. A number of communities have sent large enough delegations on Operation Israel flights to constitute community missions within these nationwide assemblages and have found this productive in raising the level not only of giving but of campaign climate and spirit as well. Solicitation is organized and conducted by national UJA personnel; in the case of large delegations, there is close cooperation with community leaders. The four missions completed in the Operation Israel program for 1973 to date have produced close to half a million dollars in new money for a 55% increase.

.....

10. Operation Upgrade. A program specifically aimed at raising the level of gifts in the \$1,000 - \$10,000 range through solicitations carried out inside the communities themselves, Operation Upgrade was initiated last year with spectacular success. Operating largely between October and March, it provides subscribing communities with a lay solicitor force of some 150 men from all over the country who have made their exemplary gifts and who are trained and eager to solicit comparable ones. Each of these Upgrade workers - the majority of them young leaders under 40 - makes himself available at frequent intervals to travel into communities not his own, by invitation arranged with the national UJA office, for one or more days, teaming up with a local worker in solicitations of community-selected prospects. For greatest efficiency and peak return on investment in transportation and lodging, Upgrade workers aim at a minimum of four solicitations a day. For saturation campaigning, several workers may be brought in at a time, particularly in large cities, and a number of successive days devoted to Upgrade solicitations. The full 1972 Operation Upgrade record showed a total of \$778,000 in new money, and a 47% increase over 1971. A large number of gifts were moved from the lower to the upper half of the target range, several broke the \$10,000 barrier.

11. Operation Breakthrough. All of the above programs are primarily concerned with contributors in various categories who are known to the local federation or welfare fund and whose potential can fairly readily be estimated. In recent years, we have come to realize that there is also an important number of potentially large

givers among men who have acquired a considerable amount of money quickly through stock transactions; they have either been completely unreached by organized Jewry before, or their new, enlarged potential has not been fully grasped. Through diligent financial research, national UJA's Operation Breakthrough program has, over the past two years, identified several hundred such prospects and has elicited from a number of them what amounts to quantum leaps in giving ... from as low as zero to as high as \$1 million. Specifically, some examples of these sizeable rises are: \$2,000 to \$350,000; \$5,000 to \$250,000 and \$10,000 to \$250,000.

At first glance, this may seem like one-time giving, with a sharp falloff expected. Such has not been the case. Former non-givers or undergivers are now contributors at important levels and retain a high potential for future increases within the other level-increasing national and community programs.

Operation Breakthrough national solicitations are largely conducted by an Israeli citizen who represents the people of Israel in forthright one-on-one talks with the undergivers and non-givers he sees. In some cases a UJA National Chairman or a prominent local lay leader is involved. Some communities are developing their own Breakthrough programs of research and solicitation, calling on the Israeli solicitor whenever warranted by the situation.

12. Resident Solicitors Program. In the era when public meetings were the major vehicle for priming and raising gifts, the presence of a personable, informed and articulate Israeli was always considered highly advantageous and productive. In the current era

of emphasis on direct solicitation, the use of Israeli visitors in asking for gifts has become increasingly widespread. Communities report that the presence of an Israeli, along with the assigned worker or outside solicitor, has proven very effective in lowering resistance and obtaining gifts at the rated level. The visitor does not directly ask for money; his very presence and articulated knowledge, however, are powerfully persuasive factors.

In recognition of this, national UJA makes selected Israeli personalities available to subscribing communities for periods of two weeks or more, largely during the first months of the calendar year, after campaigns have been formally opened. During their residency, they are also available for workers' meetings and whatever climate-setting and gift-recording events remain on the community calendars.

13. Operation Freedom. In the past two years, another type of visitor whose presence and personal history are potentially strong sources of persuasion toward increased giving is the Soviet Jewish immigrant. As the embodiment of a moving, dramatic and continuing headline story which is the primary factor in today's need for raised levels of giving, the Soviet Jewish immigrant is reported to add considerably to the effectiveness of community leadership meetings, public meetings ... and, in some selected cases, solicitations in which he performs the same functions as the Israeli visitor. Operation Freedom, national UJA's program of providing such immigrants to subscribing communities, functions in both the pre-campaign and campaign periods.

14. Other Campaign Programs and Trends. In addition to the above programs and events, which are solidly locked into the UJA calendar of operations, a number of other program concepts have emerged in recent years - one-time operations, plans in a pre-operational stage, experimental new directions - in the constant search for new constituents and raised giving levels. Among them:

a. Resort Area Fund-Raising Program. Increasingly in the past decade, men of wealth in the United States have taken up semi-permanent residence - up to half a year - in sunshine resort areas; many others reside in them through the winter months. Chief among these areas is the southern end of the state of Florida, to which high-level givers from the eastern half of the country come in large numbers. As a supplement to its 1973 big gifts effort, the national UJA is mounting a concentrated Florida solicitation campaign during the peak-season months of January and February. It is hoped that singling out donors in this special way, in a program embracing their peers from other parts of the country, will result in greater increases than would their separate solicitations in their home communities when they return in the Spring ... at a time when campaign momentum may be lagging.

b. Operation Jet. Sporadically over the past few years, National Chairmen and other highly-placed UJA officers have participated in one- or two-day jet plane sweeps of states and areas with widely-scattered Jewish populations, conducting solicitations of a number of potentially good middle-level and top-level gifts. Increases obtained in this way have been very high, an outstanding

example being an Operation Jet in Mississippi in 1972 which, in 48 hours covering half a dozen communities, produced almost as much new money as was raised in the entire state of Mississippi throughout the full year of 1971. This kind of operation requires long and painstaking pre-planning and prospect identification by field professionals, which militates against its use on a continual basis. National UJA is always ready, however, to activate an Operation Jet whenever field data indicates it is needed and will prove productive.

c. Women of Independent Means. Since 1968, the Women's Division of the United Jewish Appeal has raised the level of its giving at a faster rate than the national average. It has accomplished this, essentially, without introducing any new fund-raising programs, concentrating instead on improving, streamlining and re-energizing its basic procedures; on strongly asserting the principle that a woman's only meaningful gift is extra giving out of her own income sources, not just a piece of her husband's gift parcelled out to her for announcement; and on an organizational restructuring which places greater emphasis on regional and local planning and campaigning. The Division is ready now to strike out boldly in a new fund-raising direction which holds out promise of uncovering and bringing in significant new money. The program seeks out "women of independent means" - mostly widows who are the beneficiaries of large estates, whose husbands may or may not have been big givers in their lifetimes and who may have any degree of Jewish identification (including none) - for the purpose of soliciting them for substantial large gifts. The program is

currently in the planning and research stage; it is hoped that some solicitations will take place this year and that it will be activated on a full-time basis for the 1974 campaign.

d. Programs Reaching Prospects through Their Other Jewish Affiliations. Many UJA leaders and professionals have felt for some time that members of other organized Jewish bodies - who, by their membership are asserting their Jewish identity and concern for fellow Jews - might be a source of important new or increased giving if approached as members of their organizations... especially those who may not be readily identifiable or reachable through the customary trade and industry divisions or other peer groups. Recent beginnings toward testing that concept have been made in three organizational areas and are listed below chronologically:

(1): Congregations: The "100% Plan". Two years ago, with the consent and cooperation of the central rabbinical and congregational bodies of Orthodox, Conservative and Reform Jewry, the UJA's Rabbinical Advisory Council began asking that congregations in the United States subscribe to a "100% Plan" by making a congregant's UJA gift a condition of membership. Since then an encouraging number of community-wide congregational bodies and individual synagogues have passed resolutions supporting the plan. While it is statistically difficult to demonstrate gains achieved through these actions, the program remains in effect and is recording slow but steady progress.

(2): Memberships of Major National Jewish Organizations.
Last year, after the Conference of Presidents of Major American

Jewish Organizations passed a strong resolution calling for membership support of the UJA's Israel Emergency Fund, contact was established with the leadership of that central body and of its member organizations. Among the results were: public endorsement of UJA campaign support by some of the member organizations, supportive letters to memberships by some of the organization presidents, the appointment by others of UJA campaign chairmen for the first time and, in one or two cases, some organized fund-raising. Encouraged by this limited but positive beginning, national UJA intends to continue this cooperative effort in the 1973 campaign.

(3): Board Members of National UJA Constituent Agencies.

For the 1973 campaign, in the belief that the members of the boards of agencies whose humanitarian work is carried out with funds provided through UJA campaigns should be full-capacity givers, we are asking the lay heads of those agencies to analyze board giving and to solicit or re-solicit those gifts which do not measure up to that expectation. We hope in this way to evoke additional increases of consequence in middle-level and high-level giving.

The programs, projects and practices described above do not exhaust the possibilities for raising the level of giving in the UJA campaign. As communities mature in their planning and evaluation procedures, as lay and professional experience and sophistication increase, as field experience and training programs create more resourceful workers, as rising young leadership projects itself more strongly into the national fund-raising picture, and as growing overseas needs year after year keep challenging American Jewish ingenuity ... there will be more -- perhaps better -- new angles, ideas and approaches to asking for and getting responsive and responsible increased campaign gifts.

file

UJA
FROM THE
GENERAL
CHAIRMAN

January 9, 1973

Dear Herb:

As our campaign plans develop for the first two crucial months of the calendar year, I know you will want to be made aware of projected UJA departmental activities.

Enclosed for your study and comment are reports on the January-February plans of the Education Fund, Operation Breakthrough, Women's Division, Young Leadership Cabinet, Operation Upgrade and the Public Relations Department.

With best regards.

Sincerely,

Paul

Paul Zuckerman


PZ:DMF

Enclosures

MEMORANDUM

TO: IRVING BERNSTEIN

DATE: January 8, 1973

FROM: DR. ARYEH NESHER 

SUBJECT: ACTIVITIES PLANNED FOR JANUARY AND FEBRUARY, 1973

Following your request for a plan of activities for the next two months, here is a general outline:

1. Intensification of research processes
2. Intensification of solicitations
3. Training

Here is my itinerary for training and solicitations:

<u>DATE</u>	<u>AREA</u>	<u>COMMENTS</u>
Jan. 9, 10	Seattle, Wash.	Solicitations and Seminar
11, 12	Tampa, Fla.	Solicitations
17	New York City	Seminar
18	Essex County, N.J.	Solicitations
19	New York City	Solicitations
21	New York City	Seminar
22, 23	New York City	Solicitations
25, 26	Denver, Colo.	Solicitations
28	New York City	Seminar
29, 30, 31	New York City	Solicitations
Feb. 1	New York City	Seminar
2 - 15	Israel	Solicitations & Seminar
21	Chicago, Ill.	Solicitations
22	New York City	Solicitations
23	Boston, Mass.	Solicitations
25	Clearwater, Fla.	Seminar
26, 27, 28	Los Angeles, Calif.	Solicitations & Seminar

AN/bh

MEMORANDUM

Date December 21, 1972

To Irving Bernstein

From Eve Weiss

Subject WOMEN'S DIVISION DEPARTMENT PROGRAMS

Our projected programs in January and February are as follows:

January 16 -- will see state meetings in Alabama and Texas.

January 18 -- will have a North Carolina state planning meeting in High Point.

January 22, 23 and 24 -- will see a motorcade bringing in lay leaders into New Haven, Westport, Stamford, New Britain, Hartford, New London, and Norwich. They will have inspirational and educational meetings for their leadership.

January 24 -- there will be a major fund-raising meeting with a \$2500 base in Palm Beach, Florida.

The last function projected at this time of the year is the Women's Division Mission, which leaves January 24th and returns February 4th.

Eve

EW:m gm

December 20, 1972

To: Mr. Irving Bernstein
From: Howard Stone
Subject: Young Leadership Cabinet Program January - February, 1973

Following is an outline of our plans for January and February, per your request.

January will be a particularly heavy month for Cabinet members, most of whom are deeply involved in their own campaigns, in Upgrade and in Leadership Development programs. A minimum of half of our 20 Regional Cabinets will meet during January. We will attempt to provide as many people as possible for the Rabin luncheon in Miami Beach...concomitant to that, I do hope that our Florida Cabinet members are being utilized to the fullest, as they requested, in the Florida program.

February 15-19 are the dates for our Executive Committee meeting and weekend at the Brandeis Camp Institute. I anticipate that we will also be spending a considerable amount of time preparing for both the March mission (which leaves on the 4th) and the Pilgrimage to the Warsaw Ghetto.

My own calendar apparently will keep me out of town a great deal during both of these months. Let me know how detailed you want me to get on any of these activities.

HS:er

MEMORANDUM

Date December 18, 1972

To Irving Bernstein

From Jerry Countess

Subject UPGRADE PROGRAM FOR JANUARY AND FEBRUARY '73.

On record as of this date are 103 dates for Upgrade volunteers in 14 communities, for the month of January '73. Of that number, 49 dates have been matched with Upgrade volunteers so far. We are actively following up to fill the balance of the open dates.

In addition, community orientation and follow-up meetings are scheduled in the following communities:

Columbus
Louisville
Oakland, Calif.

Sacramento
Springfield, Ohio
St. Paul

There is also the possibility for meetings in San Francisco and Los Angeles.

Additional dates for the month of January are anticipated.

Concentration of effort will now be directed towards the operational aspect of the program, to make sure these dates are filled and that the communities have sufficient, proper appointments for our volunteers.

Acceptance of further community orientation dates will depend on: the amount of volunteers available; the ability of the Upgrade staff to handle the multitudinous details involved without weakening control through extended time in the field.

For the month of February, we have 44 dates presently listed. Eight of those dates are matched with Upgrade volunteers.

An additional objective for these two months will be arrangement of regional training seminars for Upgrade volunteers. The large attendance at the Upgrade Open Forum meeting on the morning of December 9th, during the UJA National Conference, indicates the high level of interest in the program. It also points up, however, the need for seasoned Upgrade volunteers to communicate their experience to the body of new volunteers who have not yet participated actively in the program. Hopefully these training seminars can be organized around established dates for community orientation meetings, to minimize time away from the office.

December 29, 1972

To: Mr. Irving Bernstein

From: Melvyn H. Bloom

Subject: UJA Public Relations Program Outlined -- January - February

The emphasis for the Public Relations Department for January and February is directed more heavily toward service to communities than in development and production of materials and program:

I. OPERATION OUTREACH

This will be in its most active phase, with community visits a major emphasis to help develop campaign strategy for cities which have requested our help in organizing an effective media, direct mail and advertising program which would give the most favorable impetus to the campaign. Strategy and technique in the use of special projects will be a major aspect of this counseling effort.

A. Multi-media Cantata

Communities will be guided and encouraged in the scheduling and technical demands of this program.

B. New York Times Supplement

Many communities have already expressed interest and will be counseled on the placement and creative use of this supplement.

C. Community Newspaper Supplement Package

This will be produced and guidance given in the effective use of this material to act as a stimulus to campaigns.

D. Radio Salute to Israel

Communities will be counseled and advised on the best way to place the six hour radio package which will evolve from the WMCA all-day Salute to Israel.

E. Florida Campaign

This is a special public relations campaign with emphasis on national and community placement to increase the impact of kicking off campaign through various Florida events. Personal features for hometown newspaper where deemed effective.

II. PUBLICATIONS

Features and Fillers -- two issues
Cabinet Communiques -- two issues (first one early January)
Women's Division Record -- March 1st (publication date)
Legacy Brochure

III. SPECIAL PROJECTS

A. 25th Anniversary Anthology

Continuing to work with authors. Some manuscripts are expected during this period. Expect to pursue and make decision on publisher of anthology.

B. 25th Anniversary Cassette

A cassette of historic moments in UJA over the past 25 years will be completed and available in January.

C. 25th Anniversary Radio Salute

Feature material developed and produced for WMCA program from existing tapes--impromptu interviews with Israelis in the United States for UJA, documentary vignettes from Israel on subjects of special significance to our work in Israel, historic tapes. They will utilize all the material we can feed them. Actual production of program is the responsibility of WMCA.

IV. SERVICE TO DIVISIONS

Women's Division: Operation Israel mission special dedication of Judith Stang Library for featuring in Record. Special public relations for communities on campaign, leaders and participants.

Israel Education Fund: Routine public relations services.

Young Leadership: Routine public relations services.

Student Coordinating Committee: Routine public relations services.

Rabbinical Advisory Council: Routine public relations services.

UJA
FROM THE
GENERAL
CHAIRMAN

February 13, 1973

To: Executive Committee
From: Paul Zuckerman
Subject: February 22 Executive Committee Meeting Agenda

I believe you will want to review the agenda for our February 22 meeting on Bill Levitt's yacht, which tentatively is as follows:

A G E N D A

UJA Executive Committee Meeting
12:00 Noon, Thursday February 22
Aboard "La Belle Simone" -- Palm Beach, Fla.

1. Report on Jewish Agency Assembly
2. Campaign review
3. Cash analysis
4. Florida program
 - a. Results to date
 - b. Palm Beach Dinner
 - c. Assignments
5. March 5th Dinner
 - a. Committee and community meetings
 - b. Cabinet meeting
 - c. Dinner program
6. Other programs
 - a. \$50,000-and-over gift assignments
 - b. Women's Division report
 - c. International Young Leadership Mission
 - d. Executive Committee Retreat

MISSIONS COMMITTEE
MINUTES
SUB-COMMITTEE MEETING 1/29 - 2/3, 1973 IN ISRAEL

Participants: Chairman, Louis Goldman
Mrs. Bernice Brand
Mrs. Louis Goldman
Donald H. Klein
Harvey Peltz
David Rabinowitz
Edward Rubin
Stanley Sloane
Chaim Vinitzky
David Shenhabi

Monday, January 29

The Committee met for a discussion of purposes and an itinerary orientation. After welcome by the Committee Chairman and the Director General, a free-ranging discussion ensued as a background for the week's activities.

The Committee recognized its assignment to be the review of new itinerary items for all national UJA missions in the coming year. They were therefore asked to focus upon each field visit with a specific evaluation as to which types of missions could benefit from the visit - Prime Minister's, Study Conference, Operation Israel, Cameo, Community, Women, Students, or Young Leadership, as it was recognized that each specialized mission has unique requirements.

Mr. Vinitzky and Mr. Klein reviewed the problem of rising costs. The group recognized that all missions had to be viewed within this realistic framework. Mr. Vinitzky further commented upon the problem of scheduling speakers for the many overlapping missions. The Committee reaffirmed the policy that once an itinerary and speakers are set for any particular mission, they will not be changed simply for the convenience or particular concern of each chairman. It was further recommended that all mission chairmen and staff be fully briefed in the United States as to this policy. The importance of firm, carefully interpreted ground rule for mission leadership, staff and participants was restressed.

The problem of handling first-time participants as opposed to returnees was considered. It was assessed that on all but the Prime Minister's Mission the percentage of first-timers would continue to rise; therefore our itineraries must reflect the needs primarily of this group. Though to separate first timers and returnees was determined to be counterproductive for fund raising, it was hoped that some opportunity could be found to program something special for returnees.

A brief discussion on recruitment problems followed. The Israeli staff suggested that consideration be given to bringing several Israelis to the United States specifically to aid in this task. While the Chairman welcomed this suggestion, he noted that, at the Committee's March meeting in New York, the subject of recruitment would receive full consideration.

Mr. Shenhabi then reviewed the itinerary for the Committee, stressing that every visit which has been scheduled is realistic for any and all missions, should the Committee decide to include it. He further stressed that in most instances the visits have been built with the objective of mission participants meeting with people in greater depth, rather than just sight-seeing. The day by day review then ensued (see attached).

Notes on Field Visits - January 30 to February 3

Special Army Industries

An excellent visit for part of a day. This cannot stand on its own, but is important as it shows how the I.D.F. is making maximum use of minimum resources. It further highlights the inter-relationship and use of civilian workers with the I.D.F.

Air Force Technical Schools

A good visit in which defense needs and social problems were integrated. The Committee was much impressed with how the 16 through 18 year olds learn a vocation useful to the defense forces, with later adaptation to civilian life.

Non-Commissioned Officers' School

While the Nahal Non-Commissioned Officers' School physical setting was most impressive, the group agreed that only if extremely well planned could this item be useful for more than a brief stop. The setting itself is adaptable to Study Missions, as well as other trips.

Visit to Successful Development Town - Migdal Ha'Emek

The Committee was totally convinced that an in-depth visit to a development town - a visit in which is included meetings with city and government officials, tours of nursery schools, centers, industry, and visits to immigrants in their apartments, etc. would be most useful to all groups. A very clear picture of the total immigration and social needs can be interpreted. The impact of the Jewish Agency and UJA was very striking. While the group did not visit an unsuccessful development town, it was clear that, with careful preparation, almost any development town could be studied with the same results. The Russian immigration story is effectively interpreted. Definitely a highlight of the trip.

Armory School

While quite interesting, particularly as it highlights a new program of dealing with street gangs in a most imaginative way, this visitation does not lend itself to large groups. It can be used for, at most, one bus-load City Missions, or individual visitors.

Allenby Bridge

Most definitely a "must". The group saw this visit and the Gaza Strip visit, as definite substitutes for Canal trip for next year. Clearly interprets the defense and political problems in a most human way.

Nahal Gittit

Coupled with the Allenby Bridge visit, the Nahal visit is most effective. A full feeling for the West Bank, for the role of the Jewish Agency and UJA is easily interpreted.

Gaza Strip

While each item visited was interesting and valuable, the total visit makes the impact. The Arab industries, the visit to the refugee camps, the visit to the Arab Vocational School, all are excellent. When followed by the visits to Pithat Rafiah and Nahal settlements in the Strip, the total problem of Israel is highlighted. Though we will have to overcome the problem of interpreting use of Jewish Agency money beyond the Green Line (no direct UJA-UIA money is used), all were convinced that this visit should be included in the Prime Minister's, Study, Operation Israel, and other missions wherever possible.

Sharm el-Sheikh - Road to Eilat, a visit to settlement in Arava

While a most interesting tour, the Committee unanimously felt it not appropriate for most UJA missions, with the possible exception of Community Groups staying in Israel 14 days. As this visit would be two days in length, while balancing the need to show the southern part of the country, the input, effort and expense, when related to the results were not deemed appropriate.

Final Meeting - February 4 - 9:30 p.m. - Home of Chaim Vinitzky

The Committee reviewed its activities of the week and, through extended discussion attempted to build an ideal Operation Israel itinerary for a couples ten-day trip. Consideration was given to the fundraising needs as they relate to the itinerary and much thought given to proper scheduling of hotel accommodations.

The Sub-Committee recommended that for '73-'74 we operate completely out of the Hilton in Tel Aviv, with one night in the north, while offering the option of Friday in Jerusalem as was done two years ago.

The following basic itinerary was structured:

Sunday - Departure

Monday - Arrival

Tuesday - Absorption Center and Development Town (evening speaker)

Wednesday - Gaza Strip (evening speaker)

Thursday - Allenby Bridge and West Bank (evening speaker)

Friday - Jerusalem (optional overnight)

Saturday - Optional

Sunday - Northern border and/or Golan with overnight in north

Monday - Continuation of Haifa and north

Tuesday - JDC - Youth Aliyah - Army installations

Wednesday - Departure

In further discussion the Committee strongly recommended that a permanent staff be assigned to the Operation Israel missions. Just as Ed Rubin worked with each mission as a resident in Israel, it is hoped that at least one more permanent staff member could be assigned in Israel. This would lead to far more consistency and quality in the solicitations and mission touring process.

Calendar

Taking into consideration the campaign needs and also the practical problems of the Israel staff, the following calendar was agreed upon for recommendation to the full Committee:

- #1 Women's Division Major Gifts - October 28 - November 7
- #2 Men - November 11 - November 18
- #3 Couples - November 25 - December 5
- #4 Men - December 9 - December 16
- #5 Students - December 19 - December 30
- #6 Couples - January 6 - January 16
- #7 Women - January 20 - January 30
- #8 Couples - February 3 - February 13
- #9 Couples - February 18 - February 28

After the Chairman thanked each member of the Committee for his efforts and expressing gratitude to Mr. Vinitzky and Mr. Shenhabi for their preliminary work in preparation for the Committee and for the outstanding cooperation during the week, the meeting was adjourned at 11:30 p.m.

MISSION COMMITTEE - 1973 - 1974

ITINERARY

MONDAY, January 29

Meeting and Discussion on Itinerary

TUESDAY, January 30

7:30 a.m.

Leave for visit to
Special Army Industries
Air Force Technical Schools
Non-Commissioned Officers' School
Return to Tel Aviv

WEDNESDAY, January 31

7:30 a.m.

Depart for visit to study successful
development town of Migdal Ha'emek
Lunch
Depart for visit to study unsuccessful
development town of Ma'alot
Return to Tel Aviv

THURSDAY, February 1

7:00 a.m.

Depart for visit to Armory School
Continue via Jerusalem to Mitzpe Shalem
(Nahal)
Drive via Nahal Gilgal and Masuah
Visit Allenby Bridge
Visit Nahal Gittit
Return to Tel Aviv

FRIDAY, February 2

Depart for Gaza Strip
Visit Paratroopers Training School
and Parachute Folding Depot
Visit Gaza Strip, including refugee
camp and meet with a representative
of the Army Administration
Visit Pithat Rafiah and Nahal Settlements
in the Strip
Return to Tel Aviv

SATURDAY, February 3

Fly to Sharm-el-Sheikh
Visit the area
Drive by bus to Eilat via Nu'eba and Dahab
Visit the City of Eilat
Lunch en route
Drive and visit settlements along the
Arava Road
Visit Mamshit (Kurnob) excavations
Return to Tel Aviv

Evening - Final Meeting to discuss
Itineraries.

M I N U T E S

UJA EXECUTIVE COMMITTEE

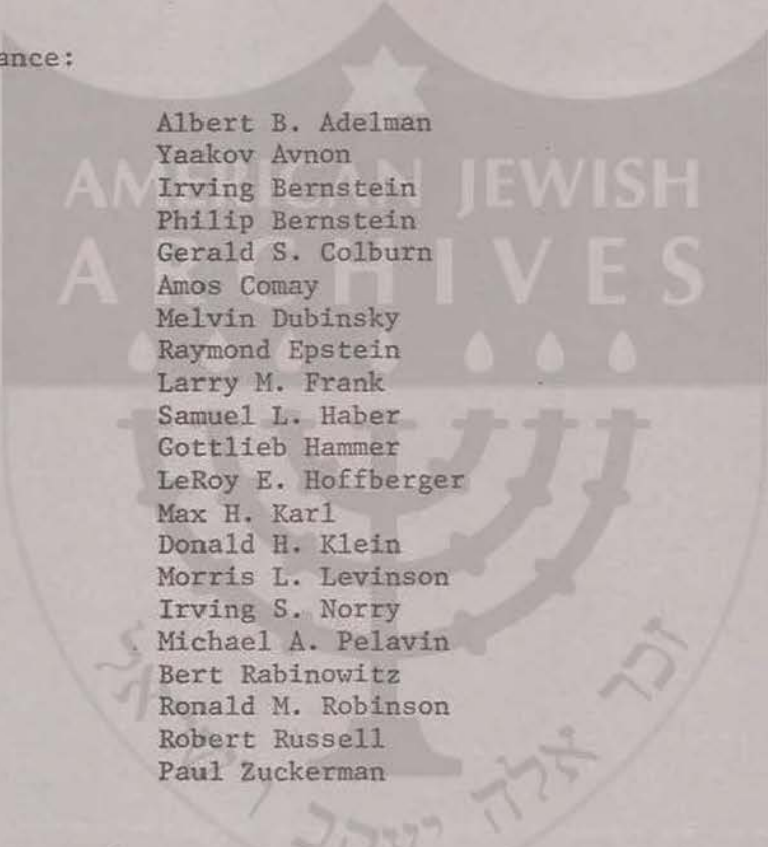
February 5, 1973

2:00 P.M.

Olive Room - King David Hotel

Jerusalem, Israel

Attendance:



Albert B. Adelman
Yaakov Avnon
Irving Bernstein
Philip Bernstein
Gerald S. Colburn
Amos Comay
Melvin Dubinsky
Raymond Epstein
Larry M. Frank
Samuel L. Haber
Gottlieb Hammer
LeRoy E. Hoffberger
Max H. Karl
Donald H. Klein
Morris L. Levinson
Irving S. Norry
Michael A. Pelavin
Bert Rabinowitz
Ronald M. Robinson
Robert Russell
Paul Zuckerman

Mr. Zuckerman expressed his appreciation to all for attending this special meeting of the Executive Committee called during the Jewish Agency Assembly. He indicated that with the pressures of the campaign now upon us, and particularly with the Golda Meir dinner scheduled for March 5, there were several policy decisions related to March 5 which had to be considered.

March 5

Mr. Bernstein reviewed the basic schedule of Mrs. Meir's visit to the United States and preliminary plans for the day given over to the UJA. The focus of the dinner and all preliminaries has been conceived as a vast report meeting against which communities throughout the country could accelerate and give impetus to their campaigns. To accomplish this, an expanded Campaign Cabinet meeting had been called for noon, a special reception for campaign chairmen with Mrs. Meir at 6:00 p.m. and then the banquet itself.

A full discussion ensued regarding maximizing the importance of this day for campaigning. The group strongly felt that the luncheon meeting should be the beginning of formal activities and that programming at lunch and for the afternoon should be focused on the practical programmatic resources available to communities. The following outline was agreed upon:

- a) An advance notice should be sent to all communities, encouraging individualized community consultation at pre-scheduled times. This consultation would be geared to the needs as seen by each community with both professional and lay leadership made available to meet as necessary.
- b) The luncheon itself would feature four short presentations by community representatives on national programs they have successfully used. Suggested for presentation was Operation Upgrade (Columbus, Ohio), Resident Solicitor (Los Angeles), Operation Breakthrough (Orlando, Fla.), Cameo Missions (Baltimore, Md.). In each instance, following the community presentation of 5 to 7 minutes, a National UJA resource would be available to answer questions and to comment.
- c) Following the formal portion of the luncheon, the bulk of community consultations would be scheduled. Opportunities to meet with various other departments of UJA would also be available.
- d) The early evening reception with the Prime Minister would be strictly for campaign chairmen and their wives, photos will be taken, an opportunity will be provided for each campaign chairman to write a special message in a book for the Prime Minister and other special recognition will be given to the community leadership.
- e) At the dinner itself campaign and cash results will be broadcast on special screens in order to give public recognition to each community, while not deflecting from the more formal program following dinner.

Mr. Klein, who was departing the next morning for New York, was to immediately implement the decisions reached.

Keren Hayesod - United Jewish Appeal Dialogue

Mr. Zuckerman and Mr. Bernstein discussed implementation of several programs suggested at the World Fundraising Committee meetings held last February designed for the development of greater interchange and understanding between Keren Hayesod and the United Jewish Appeal. The professional Fundraising Institute, the use of lay leadership as speakers and solicitors in other countries, and the establishment of opportunities for greater dialogue, professional to professional, and layman to layman, were highlighted. Since, at this Assembly there are large groupings of laymen from various countries and also from various cities in the United States, an attempt is being made to establish contacts between these groups. As a beginning, several city groups have been asked to meet with country delegations for an interchange of experiences and ideas. The cooperation of the Executive Committee members for this project was asked and enthusiastically accepted. Four meetings either have been, or will be, set up during the week of the Assembly.

The meeting was adjourned at 3:30 p.m.

UJA

FROM THE
GENERAL
CHAIRMAN

February 12, 1973

Mr. Herbert A. Friedman
United Jewish Appeal, Inc.
1290 Ave. of the Americas
New York, N.Y.

Dear Herb:

For the past two years, the UJA University Students Mission was, in a sense, experimental. For the first time they were co-educational. Our experiment proved successful.

The results of our experience were most gratifying. Everything functioned smoothly and the students returned home with a sense of commitment which augurs well for the future. Since the objective of our annual University Mission is the development of leadership, it is good to note that most of the students are taking an active role in campaigns on their campuses and will eventually become part of the leadership of their communities.

Our seventh University Students Mission is scheduled for July 5th to August 15th. Of these six weeks, two will be spent in Europe and four in Israel. The students will visit Austria, Germany, Rumania, France and will tour all of Israel. In Europe they will survey the work of the JDC and other constituent agencies of the UJA, study the rise of Hitlerism, the Holocaust and the destruction of the great European communities, visit former concentration camp sites and acquire an insight into the Jewish tragedy of the past. In Israel they will meet with outstanding personalities as well as students, and study all facets of life in the country.

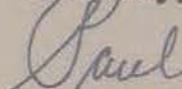
This year, the Mission will be under the direction of Rabbi Earl Jordan who, last September, assumed the responsibility for our University Programs.

Students with leadership potential who have completed at least their freshman year of college and are under 24 years of age are eligible for participation. The cost per student will be \$1,400.00 which includes overseas flights and all travel, meals and hotels.

This initial notice is going to the official UJA family, many of whom have student children, grandchildren and other members of their families who may be interested in joining the Mission. Last year the demand for participation was greater than we could accommodate. We are planning to take seventy students this year. For additional information and applications please contact Rabbi Earl Jordan, Suite 2900, 1290 Avenue of the Americas, New York, New York 10019.

With kindest personal regards.

Cordially,



Paul Zuckerman

PZ/jis

UJA

FROM THE
GENERAL
CHAIRMAN

February 26, 1973

To: Executive Committee

From: Paul Zuckerman

Attached for your information is a copy of a letter to Rabbi Earl Jordan, Director of our University Program, from Miss Debbie Brockman one of the participating students at Kent State University in Ohio. It is, I believe, a thoughtful letter -- and an encouraging result of our new approach to students.

Miss Brockman attended one of the Weekend Institutes for Campus Campaign Leadership which are part of the UJA program this year.

PZ:bga
Att.

Paul

C O P Y

January 28, 1973

Dear Rabbi Jordan,

I was one of the students who attended the UJA conference in Cambridge this weekend. I'm writing to express my feelings about the conference.

The weekend was really quite a special one, and I'll never forget it. When we from Kent walked into the Lodge we were amazed -- the place was like a "palace". But it meant a lot more to me that I could ever imagine when I left.

Before this weekend I was a Jew. I had been to services at Hillel and taken part in them, but now I realize something was missing. Friday night services were very good. I could compare it to a Kent Hillel Service. But Saturday's Shabbat Service was beautiful, and that's why I'm glad we were at the Lodge.

I did not follow any of the service that morning. I was aware of the chanting and prayers of the other people. I was looking out the window -- "watching" the fog, mountains, and the water. I suddenly realized G-d was there. I didn't really need the prayer book or the prayers. I could have my own private conversation with G-d.

This might sound "melodramatic", but I really felt it. I also realized that I wasn't just a Jew, but I am Jewish -- if you can understand what I mean. How could I go to others, speak to them on behalf of the UJA, Soviet Jews and Israelis if I didn't know "where I was?"

After the services were over, I stayed in our "chapel" and just thought. Aaron came over and talked with me, and I tried to tell him what I've just told you. (I'm better at expressing myself through writing than speaking.) I think he understood, and we talked a little about creation.

I would like to say that Aaron really came across. He's a cool guy and I think a lot of the kids related to him and the service. (I intend to write him and thank him for being there.) His music kind of brought people together. One moment I will remember is when he was playing "Fiddler" music and the little girl came in and sat on my lap while he played "Sunrise, Sunset".

Charlie did a magnificent job! He was always there -- and always busy. Donna did a super tremendous job of organizing everything. It was really amazing how everything was so smooth.

Another point I would like to make about Aaron, which seemed to relate to a statement you made this morning. I don't remember your exact words but you said (referring to the UJA campaign), we don't want a fund raiser... like bring in Melanie...we want to educate. Saturday night, after our Israeli dancing, Aaron was playing in the lounge, as he told you. He was singing, he was wearing his yarmulke, and he made several remarks and sang songs that indicated he was Jewish. We also sang "Hava Nagila" and danced the Hora. I think

all this relates to your statement "we want to educate." I think we did that last night. I don't know if there were any "Jew-haters" or people who thought Jews were different, but even if we made one person think, it was educating someone. I really think it added tremendously to the weekend.

When I got back to my apartment in Kent, I took out a prayer book, (Conservative, I think) and read some of the supplementary readings in the back. I've read these before but they seemed to mean a lot more after this weekend. The ones I really "got into" were: "The Meaning of Faith," "Life -- Fashioned By Prayer," "The Jewish Home," and "I am a Jew."

I know this is a lengthy letter, but this is how I feel. Maybe I didn't get everything out of it that I should have for the campaign, but I really know now that I am Jewish. And maybe this is a step in the right direction for helping my fellow Jews.

Thank you so very much!

AMERICAN JEWISH
ARCHIVES

Live long and prosper.

Shalom,

Debbie Brockman

זכר אלה יעקב וישראל

UJA

FROM THE
GENERAL
CHAIRMAN

February 26, 1973

To: UJA National Chairmen

From: Paul Zuckerman

I believe you will be interested in reviewing the enclosed copy of the agenda for the series of Operation Upgrade seminars now underway. The first seminar was held in New York on February 13, and other seminars will be held in Cleveland, Los Angeles, Dallas, and possibly Chicago.

Paul

PZ/scb
Enc.

2/12/73

OPERATION UPGRADE

Training Seminar

2/13/73

AGENDA



AMERICAN JEWISH
ARCHIVES

The Upgrade solicitor's gift:

Must be a good one.

Must be committed prior to going out as Upgrade solicitor.

The Upgrade role in the community - a dual function:

Solicitation
Training

Relationship to local lay leader:

Emphasis on training, not socialization.

Importance of call prior to going into community to:

Find out about your local lay leader, his gift, background, how much support he can give.

How many appointments does he have?

How much can he tell you about your prospects?

The follow-up with Upgrade if there aren't enough appointments. (At least four. Preferably six.)

The attitude of the Upgrade solicitor in the community:

You're there to tell the story, not argue with your prospects.

Information:

Can you tell the story, whether it's Soviet Jewry, Israel's needs, needs of the local community?

Use Upgrade as a source of information.

Page 2 - Continued

The close:

Upgrade results vs. community results on follow-up.
Try to avoid postponement of decision on gift.

The follow-up:

Solicitor responsibility to follow-up when gift is not closed, if possible.

Report to Upgrade:

The need for prompt, complete return.
The value to the community's future campaign of information learned during solicitation.

The calendar:

Not just a report on what's happening.
Use it as an aid in picking future dates.
If you have information on people in communities where Upgrade is working, pass it along to us.

Recruitment:

Upgrade is expanding.
We need to involve more lay leaders.
The lay leader accompanying Upgrade solicitor as a potential volunteer.
Other possible resources: retired Chairmen, Federation presidents, division chairmen.

Upgrade volunteer responsibility to work on Upgrade program in their own community.

Discussion on technique, approach, the close.

Practice solicitations.

UNITED JEWISH APPEAL, INC.
1290 AVENUE OF THE AMERICAS
NEW YORK, NEW YORK

M E M O R A N D U M

February 28, 1973

CONFIDENTIAL

To: UJA Executive Committee

Re: Executive Committee Luncheon Meeting, February 22, 1973 aboard
Mr. William Levitt's yacht "La Belle Simone" in West Palm Beach.

The following were present:

Albert B. Adelman	James H. Nobil
Leonard D. Bell	Irving S. Norry
Charles J. Bensley	Michael A. Pelavin
Irving Bernstein	Martin Peppercorn
Larry M. Frank	Donald M. Robinson
Charles Ginsberg, Jr.	Robert Russell
Louis S. Goldman	Charles Rutenberg
Joseph H. Kanter	Lawrence Schacht
Burton I. Koffman	Robert M. Schroyer
William J. Levitt	Joseph D. Shane
Julian L. Meyer	Mrs. Burt J. Siris
Joseph Meyerhoff	Stanley L. Sloane
Ernest W. Michel	Philip Zinman

Paul Zuckerman

Mr. Zuckerman thanked Mr. and Mrs. Levitt for making La Belle Simone available for the meeting. He welcomed five new members of the Committee: Mr. Koffman, Mr. Levitt, Mr. Meyer, Mr. Norry and Mr. Sloane.

Israel General Motta Gur summarized information available at the time on the interception and crash of a Libyan airliner in Israel territory, and responded to questions.

Mr. Bernstein displayed an advance copy of the New York Times March 4 Sunday Supplement, sponsored by UJA and developed by the Public Relations Department, marking Israel's 25th Anniversary. Based on an original national run of 1.5 million, a probable re-run and the planned publication and distribution of local versions, it can be estimated that the supplement will reach 6 million

.....

homes. Benefits to UJA include: reaching a large number of people who may never have known its lifesaving aim and history; added stature and prestige; possibly impact on the campaign.

Mr. Zuckerman, reporting on the recent Jewish Agency Assembly in Jerusalem, characterized it as useful and, when viewed in historical perspective, an important step forward. A gathering of world Jewish leaders, Zionist and non-Zionist alike, to exchange ideas and apply their expertise to Agency budgetary and other substantive matters was envisioned by Chaim Weizmann and Louis Marshall 44 years ago but failed to materialize. The 1973 Assembly of 300 world leaders was the historic beginning of the realization of that vision. Discussion developed the point that dealing in practical terms with the Agency's budgetary deficits was a revealing and valuable experience for American participants and underlined the need for more productive campaigning and cash collection. The mid-campaign timing of the Assembly was considered unfortunate; it was indicated that future meetings will be held in June, so that this will no longer be a problem.

Mr. Zuckerman reported that the 1973 campaign total of \$115 million to date is \$14 million ahead of last year's campaign on the same date ... and \$20 million ahead on a card-for-card basis. He stated that Israel Finance Minister Sapir closed two million dollar gifts during his recent visit. - Mr. Bernstein observed that the 1973 total of gifts in the million-dollar-minimum category is now 20, exceeding last year's aggregate. He reported that UJA has become the beneficiary of a multi-million-dollar estate in Texas, the current gross value being \$10 million; the ultimate value, when other life interests end, could be \$20 million; none of the proceeds is earmarked for capital projects and all will be applied to immigration and absorption programs. - To Mr. Zuckerman's comment that the 1973 campaign is certain to exceed that of 1972, Mr. Bernstein added the observation that the "bellwether gift syndrome" - the raising or cutting of certain key gifts directly affecting the rise or fall of a campaign - is no longer in force; the fact that the 1972 campaign showed an increase despite losses in 37 communities is indicative of this development.

In contrast, Mr. Zuckerman noted, cash collections in 1973 are seriously behind last year's, the gap being close to \$6 million, and that a substantial part of the arrears rests with the Executive Committee and National Campaign Cabinet. He urged Committee members to make substantial payments on their pledges immediately. Although very much aware of the reluctance of Executive Directors to run an intensive collection drive simultaneously with their campaigns, it was suggested that a stepped-up-cash drive should begin at once, designed to culminate in maximum collections on May 7, Israel's Independence Day. This date is one month earlier than the traditional June ending of the standard "spring cash drive." The Executive Committee agreed to this program.

Mr. Ginsberg reported on the progress of the UJA National office's Operation Florida, carried out in close cooperation with the UJA of Greater New York and with the participation of other communities. The successful elements have included a highly stimulating climate-setting luncheon as a farewell to Israel Ambassador Yitzhak Rabin; an outstanding Women's Division \$2,500-and-over

luncheon (details below in separate report); a \$100,000-and-over dinner on the Levitt yacht, in which 47 gifts produced \$2.6 million in new money; a William Rosenwald cocktail party attended by 65 people which yielded \$900,000 in new money; excellent solicitation efforts by Cleveland in which 10-12 men participated effectively, climaxed by a function resulting in a total of \$120,000 in new money coming from 20 gifts; and highly productive efforts by Mr. Sapir, who - despite illness - saw 26 people in behalf of UJA and Israel Bonds, closed the two million dollar gifts noted above and appeared at a Miami Pacesetters Meeting, at the close of which that community had reached a \$3,750,000 campaign total, a record for that date; Mr. Sapir, he reported, was greatly moved and heartened by the prevalence of a large number of highly motivated and committed young people at that meeting. Among the Operation Florida shortcomings Mr. Ginsberg reported was the inability to stimulate fund-raising meetings or productive solicitation among communities other than Cleveland; the general inadequacy of contributor coverage, particularly in concentrated areas of residence such as condominium apartment houses and the thinness of national leadership involvement. The Operation Florida Committee will shortly present a series of recommendations for the improvement of future operations.

The ensuing discussion of Operation Florida developed the following points on which there appeared to be general agreement: that there are some different points of view about coverage of New Yorkers and of part-time residents from other communities, which need adjusting; that the system whereby communities relay information about contributors relocating in the Florida area on a part-time or permanent basis - currently supposed to be carried out through the Council of Jewish Federations and Welfare Funds - should be studied and appropriately clarified and strengthened; and that the advisability of making the program a year-round operation and staffing it accordingly should be explored.

Mr. Bernstein briefly reviewed the program for the March 5 dinner in honor of Golda Meir, re-emphasized its usefulness as a stimulus for intensified campaigning, pointed to Los Angeles' pre-dinner activities - involving the use of three national chairmen - as a model and expressed the hope that Committee members would take the lead in bolstering activities in other cities during the week or so remaining.

Mr. Adelman, reporting on the \$50,000-and-over program, noted that - while a majority of the gifts in the category had been closed during the major early events in the campaign (Prime Minister's Mission, Study Conference, Million Dollar Meeting, Inaugural Dinner, \$100,000 Levitt Yacht Meeting, etc.) - an important number is still outstanding. A breakfast meeting of the program's committee the following morning (February 23) would develop a full program of coverage.

Mrs. Siris' report on Women's Division activities included the following facts and observations: 1) - The Division's 1972 campaign showed an 11 per cent increase, as compared to about 5 per cent in the overall national campaign; 2) - The Division's 1973 campaign is currently showing a 35 per cent increase, as against 25 per cent at the same stage last year; 3) - The Palm Beach luncheon mentioned by Mr. Ginsberg was enthusiastically oversubscribed, with 116 attending, and resulted in increased giving totaling \$300,000; 4) - The

.....

Division's decentralization program, dividing the country into 12 regions headed by Vice-Chairmen who are working with creative independence, is yielding excellent campaign results and, in effect, developing 12 women of potential National Chairmanship caliber; 5) - The Division's Retreat, which last year stimulated deeper commitment and broader involvement, will be held again this coming May at the Sterling Forest, N.Y., Conference Center.

Mr. Pelavin described the elements of the Young Leadership Cabinet's forthcoming International Mission and Retreat, beginning March 17. Although logistical problems are currently making the inclusion of delegations from any other country besides Great Britain uncertain, there is still hope that there will be other representation; in any event, this will be the first international venture of this kind involving major elements in campaign leadership and is a timely possible forerunner of the senior International Retreat proposed by the Fund-Raising Committee of the Jewish Agency. The Mission will visit Vienna, Warsaw and Cracow. The theme of its three-day Retreat, in London, will be a projection of the next 25 years in Jewish history. Mr. Pelavin also reported that, as part of the YLC's Judaica Program, a series of 12 tapes prepared by foremost scholars covering various aspects of modern Jewish history is being produced and will be made available for community use in leadership development activities. - A brief discussion included a suggestion that practical forms and procedures be developed to encourage communities and individuals to identify potential new young leaders.

Mr. Zuckerman reported that early response to the Executive Committee Retreat, June 21 to 24 in Bermuda, has been excellent.

Mr. Zinman stated that Israel Education Fund solicitation results with prospects named by Committee members have been very good and he urged further recommendations.

Mr. Zuckerman adjourned the meeting with renewed thanks to General Gur, to the host and hostess, and to the Committee members for their active participation.

#