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M E M O R A N D U M

May 11, 1973

CONFIDENTIAL

To: UJA National Officers

RE: Notes on National Officers Meeting, May 3, 1973 at the UJA office
in New York City. Mr. Paul Zuckerman presided.

The following were present:

| | |
|----------------------|---------------------|
| Albert B. Adelman | Michael Pelavin |
| Irving Bernstein | Martin Peppercorn |
| Melvyn H. Bloom | Bert Rabinowitz |
| Gerald S. Colburn | Mrs. Burt J. Siris |
| Melvin Dubinsky | Leonard R. Strelitz |
| Joseph H. Ehrenkranz | Marc Tabatchnik |
| Louis S. Goldman | Jack D. Weiler |
| Alexander Grass | Philip Zinman |
| Samuel L. Haber | Paul Zuckerman |
| Frank R. Lautenberg | |

Mr. Zuckerman noted that the date of this meeting was Prime Minister Golda Meir's seventy-fifth birthday and that he had sent a telegram to her from all the Officers wishing the Prime Minister health, happiness and peace for the people of Israel.

1973 CAMPAIGN REPORT Mr. Zuckerman reported that as of April 27, \$218,686,387 had been raised in this year's campaign, which was \$30,671,128 greater, card-by-card, than the amount raised by the same date in 1972. However, for the first time this year, the campaign was falling behind 1972 in volume, signifying that the wind-up of community campaigns was proceeding more slowly this year. The Officers were urged to exert their fullest efforts in helping to correct this trend and prevent an erosion of the good results which have been achieved thus far.

In order to achieve this end, Mr. Zuckerman then called on Mr. Adelman, Chairman of the Committee on \$50,000 Minimum Gifts, to review the status of larger outstanding gifts. Mr. Adelman pointed out that to date 453 gifts of \$50,000 minimum, totaling \$60,600,000, had been received for 1973. In all of 1972 there were 577 such gifts, totaling \$72,500,000. Of this total, the Committee has been concerned with 177 cards, the remainder being handled in the communities or in other ways. Mr. Adelman observed that the Committee members had been doing a splendid job in "going after" these gifts, but that 44 remained outstanding and presented special difficulties. These gifts were then reviewed for the purpose of reassigning their solicitation in some part to Officers whose relationships with the contributors might prove more productive in obtaining them.

In the ensuing discussion, it was suggested that perhaps approaches on some gifts should be delayed because of the current stock market situation. Mr. Bernstein urged that solicitation not be delayed but vigorously pursued since our experience has proven that Jews give on the basis of need rather than economics. It was agreed that Officers should use their discretion in deciding when to close an outstanding gift.

Mr. Adelman noted that he and Mr. Peppercorn would be in touch with everyone concerned with these solicitations to provide background information. Mr. Zuckerman stressed that gifts still outstanding must be pursued quickly and with the same intensity as at the beginning of the campaign. In graphic illustration of the importance and plausibility of continuing to "solicit for the maximum", Mr. Zuckerman gave an account of a recent evening telephone solicitation he had made which resulted the following day in a major gift plus a large cash payment from a contributor who had been considering a reduced gift.

CASH Mr. Colburn, Chairman of the Cash Committee, reported that, as of May 1, cash collections for 1973 totaled about \$49,000,000 -- over \$13,000,000 less than the \$62,413,000 collected by the same date last year. The rate of cash flow has diminished critically since the dinner honoring Prime Minister Golda Meir in March, when it was at the same level as last year. Recent efforts to increase the flow have included:

Setting May 7, Israel's Independence Day, as a mid-spring cash collection target date.

Focusing on the Passover period as a time of redemption -- redemption of pledges to redeem Soviet Jewish lives. Organizations, rabbis and individuals in communities were asked to take special note of this theme.

Arranging community assignments for all members of the Cash Committee, which has been meeting regularly. Community contacts have been made to assure that all major cities have cash chairmen and committees functioning.

Developing increased arrangements with headquarters communities -- where most of the money is -- for the involvement of national leadership and UJA executive professionals in visits to help in local cash collection programs.

Conducting a national telethon for cash at the UJA office on April 25, when 35 leaders -- Officers, representatives of all Cabinets, and Israelis -- spent all day telephoning contributors in major communities about pledge payments.

Meeting with the New York City UJA Cash Committee, including cash chairmen of all campaign divisions. Luncheon meetings are planned between top New York City leadership and New Yorkers with large unpaid pledges. Mr. Colburn added that he would be meeting during the next two weeks with cash collection leaders in Columbus, Philadelphia and Camden.

Mr. Colburn observed that it had proved difficult to obtain concerted effort in communities toward the May 7 target date due to the delay in getting in pledges in most campaigns. For the UJA to fulfill its obligations made at

the start of the year to meet Jewish Agency and JDC needs -- needs which have grown as large-scale immigration has continued, and the cost of overseas services has increased with the dollar's devaluation --, an unprecedentedly massive cash collection effort must now be mounted to attain an additional \$58,000,000 in cash during the next two months. Maximum cooperation from the Officers and other national leaders in their own and other communities will be required. Mr. Zuckerman stressed that cash collection now has priority far above all other UJA activities.

It was pointed out that the bulk of accounts receivable remains to be collected in the major communities. Of the 21 "headquarters" cities, 14 are behind last year in 1973 cash flow, as are 17 cities in the next largest group of communities. Mr. Colburn said executive directors were being consulted about specific cash solicitation approaches in these cities, and he would be in touch with the Officers about undertaking to make such approaches.

Mr. Bernstein noted the Officers, as well as the other Executive Committee and National Campaign Cabinet members, generally reside in the cities with most of the outstanding cash. Both in their own and outside communities, others look to them for exemplary action. When top leaders with gifts outstanding redeem their pledges, a great deal of "other cash" can be expected to follow. Therefore, Mr. Bernstein proposed that Officers, Executive Committee and Cabinet members undertake cash solicitation assignments vis-a-vis their fellow Officers, Executive Committee and Cabinet members with outstanding debts in the campaign. The Officers agreed to this procedure and also that the Executive Committee Retreat in June should be publicized as the target date for leadership cash payments and the spring collection drive.

Present stock market circumstances as they affect the use of securities for pledge payments were discussed. Various procedures for using stock as collateral to the best advantage in obtaining loans to pay pledges under present conditions were cited by Mr. Dubinsky, Mr. Zinman and Mr. Zuckerman, and it was indicated more detailed information about them would be made available to the UJA leadership.

EXECUTIVE COMMITTEE RETREAT The Officers reviewed together a draft of the agenda for the Executive Committee Retreat scheduled June 21 - 24 in Bermuda. (A copy of this draft agenda is attached.) It was agreed during the discussion that the following changes and additions should be made:

Schedule additional time for examination of the 1973 campaign and the lessons to be learned from its successes and failures for 1974. It was observed that the Committee meetings on Saturday morning would also provide opportunity for reviewing various campaign aspects.

Arrange for Dr. Leonard Fein to include in his Friday night presentation an account of the Young Leadership Mission to Vienna and Poland. Officers who had heard accounts at recent meetings of this unusual pilgrimage to the Warsaw Ghetto and Auschwitz described it as incomparably moving.

It is further planned to have late evening screenings during the Retreat of two independently made films -- "Tree of Life", a documentary about Israel, and a documentary produced by the Jewish Theological Seminary about the American-Jewish

community -- for those who wish to attend. After viewing a BBC produced biography of Prime Minister Golda Meir, the Executive Committee members at last year's Retreat urged that the UJA obtain rights to show it during the campaign, and it has since been very effectively utilized.

1974 CAMPAIGN Mr. Zuckerman observed that there were various factors developing in the American scene likely to create difficulties that must be overcome in the 1974 campaign. At the same time circumstances are mounting which portend new problems for Israel as well, while large-scale immigration continues. It is already obvious that massive fund-raising will be required.

Mr. Bernstein noted that it was important for the UJA to begin early to activate in the American Jewish community a spirit of confidence so that it will respond appropriately to the problems facing the Jewish Agency and the JDC in 1974.

Mr. Bernstein then presented the following activities which are planned or being considered for the 1974 campaign:

The Retreat in June. Since members of the Executive Committee represent the major communities that raise the bulk of UJA funds, it would be essential for them to announce their intentions to give more in 1974 than 1973. This early statement will have great impact on the campaign climate in communities and will prevent the erosion of confidence in the 1974 campaign.

A dinner meeting in August at the Israel Embassy in Washington for 20 to 25 key contributors from the major 21 communities, to obtain bellweather gifts and help lay the groundwork for a productive Prime Minister's Mission later that month.

An expanded National Campaign Cabinet meeting in September, possibly including a presentation by Professor Morris Albert Adelman of MIT's Economics Department who has been publishing some unusual and provocative articles on the so-called energy crisis.

The October Study Conference in Israel, which will be preceded by four sub-Missions -- to Copenhagen-Vienna, Vienna-Rumania, Vienna-Yugoslavia and to Iran. (Mr. Zuckerman asked the Officers to give special consideration to ideas for the program which will make this Study Conference as uniquely stirring as last year's.)

A closed circuit TV program in November to the headquarters communities emanating from Israel.

A million-dollar minimum gift dinner meeting to be held on the Wednesday night immediately preceding the December National Conference, rather than as previously in November.

A West Coast Conference in January or February, which will be further considered at a meeting with West Coast executives that Mr. Bernstein and Mr. Peppercorn have scheduled for May 15 -- as originally suggested by Mr. Weiler.

A "pilgrimage" to Poland, along the lines of the recent Young Leadership Mission, to be scheduled as one of the UJA's overseas trips for 1974.

Mr. Zuckerman said a variety of innovative ideas will have to be applied to assure the success of the 1974 campaigns, and he asked the Officers to consider further proposals between this date and the Executive Committee Retreat.

ISRAEL EDUCATION FUND Mr. Zuckerman then called on Mr. Zinman, commending him for his exceptional efforts this year as President of the Israel Education Fund in securing gifts for Education Fund projects "over and beyond" UJA contributions. Mr. Zinman reported that, in response to the evident availability of large gifts for projects in Israel presently outside the Education Fund's scope, it was being planned -- in consultation with the United Israel Appeal and Jewish Agency -- to expand the Israel Education Fund to include such projects. Discussions had already begun with the UIA and the Jewish Agency and the same "ground rules" would apply in obtaining donations if this program is adopted.

The manner of raising gifts for the Education Fund is controlled by the UJA and UIA. The UIA holds title to facilities for which gifts are received, and appoints the Jewish Agency to manage them in Israel. Mr. Bernstein noted there is increasing independent solicitation in American communities for special Israel projects. Donors who respond to such solicitation give their loyalty and contributions to agencies other than the UJA. Mr. Bernstein indicated that this program had been discussed with the Executive Directors of the largest cities who agree with this proposal in view of their confidence in the IEF and that the ongoing campaigns will be protected.

Mr. Bernstein said that discussions have been held with the Jewish Agency's Committee on Control and Authorization of Campaigns -- and approaches have been made -- with regard to the Education Fund's undertaking capital fund-raising in the United States for Israel's institutions of higher learning. In this year's series of meetings with them, community executives directors have indicated they would favor such a development, and at least one Israel university is considering the possibility. However, further development is expected to take considerable time. The UJA believes it can raise more money for the universities than they are receiving now and at less expense. However, this program cannot and should not be rushed into or legislated. It will succeed only if it is done on a voluntary basis. UJA has only two conditions. One is that the IEF be responsible for all capital funding in the United States and the second is that the Jewish Agency approve all projects in the same manner they do at the present time.

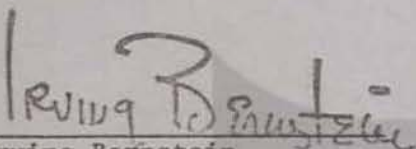
UJA - KEREN HAYESOD Mr. Zuckerman noted that, in implementation of a program of international cooperation between UJA and Keren Hayesod, Mr. Samuel Miller of Cleveland had traveled to West Germany in March to assist their campaign and Mr. Bernstein in April had addressed the Jewish leadership conferences in Argentina and Brazil. It was pointed out that this program involved the exchange of leaders in an effort to explore new avenues of fund-raising and to share methods that have proven effective in this country and abroad.

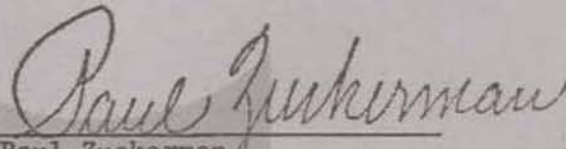
FORTHCOMING EVENTS Mr. Bernstein announced that Mr. Herbert Friedman will be the guest of honor at the Young Leadership Cabinet's Tenth Anniversary Dinner at the Washington Hilton Hotel on June 2 and invitations will be

extended to the Officers by Young Leadership Cabinet Chairman Michael Pelavin.

Israel Minister of Finance, Pinchas Sapir, will be in the United States during the first part of June to solicit his "project list" and visit many of the major communities.

Mr. Zuckerman thanked all for attending, and adjourned the meeting.


Irving Bernstein
Executive Vice-Chairman


Paul Zuckerman
General Chairman



Attachment

DRAFT AGENDA

EXECUTIVE COMMITTEE RETREAT

SONESTA BEACH HOTEL, BERMUDA

JUNE 21 - 24, 1973

Thursday Evening, June 21

6:30 P.M.

Open House Reception and Buffet Supper

8:30 P.M.

Herbert Stein - Chairman of President's
Council of Economic Advisors

The economy and economics of today

Friday Morning, June 22

9:30 A.M.

Edward Ginsberg
Chairman of JDC

Breakfast

JDC Plans - 1974

10:30 A.M.

Moshe Rivlin
Director General, Jewish Agency

Our continuing problems and responsibilities

NOON

Lunch

Friday Afternoon, June 22

2:00 - 3:00 P.M.

1973 Campaign Report

3:00 - 5:00 P.M.

Aryeh Neshet
Director, Project Breakthrough

The art of solicitation

Friday Evening, June 22

6:30 P.M.

Dinner

8:00 P.M.

Dr. Leonard Fein,
Professor of Sociology, Brandeis University.

Changing Profile of the American Jew

10:30 P.M.

Film - "Tree Of Life" directed by John Ferno

Saturday Morning, June 23

8:30 A.M. Breakfast

9:30 A.M. Sabbath Services

Committee Meetings

- a) Cash
- b) Study Conference
- c) Project Potential
- d) Israel Education Fund
- e) Florida
- f) December Conference
- g) Judaica
- h) Operation Israel and Cameo Missions
- i) Prime Minister's Mission

12:30 P.M. Lunch

Saturday Afternoon, June 23

2:00 P.M. Cash Status And Projection

1974 Campaign

- a) Committee Reports
- b) 1974 Projected Program

Saturday Evening, June 23

6:30 P.M. Reception

7:00 P.M. Dinner

8:15 P.M. Simcha Dinitz, Israeli Ambassador to the United States

Sunday Morning, June 24

Breakfast

Departures