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*Copy for Rabbi Herbert A. Friedman*

## MEMORANDUM

Mr. Melvin Dubinsky  
Mr. Max M. Fisher  
Mr. Edward Ginsberg  
Mr. Joseph I. Lubin  
Mr. Louis D. Stern  
Mr. Jack D. Weiler

Date October 16, 1972

To

From Paul Zuckerman

Subject Budget Report for Eight-Month Period Ended August 31, 1972.

Attached for your information is a budget report showing:

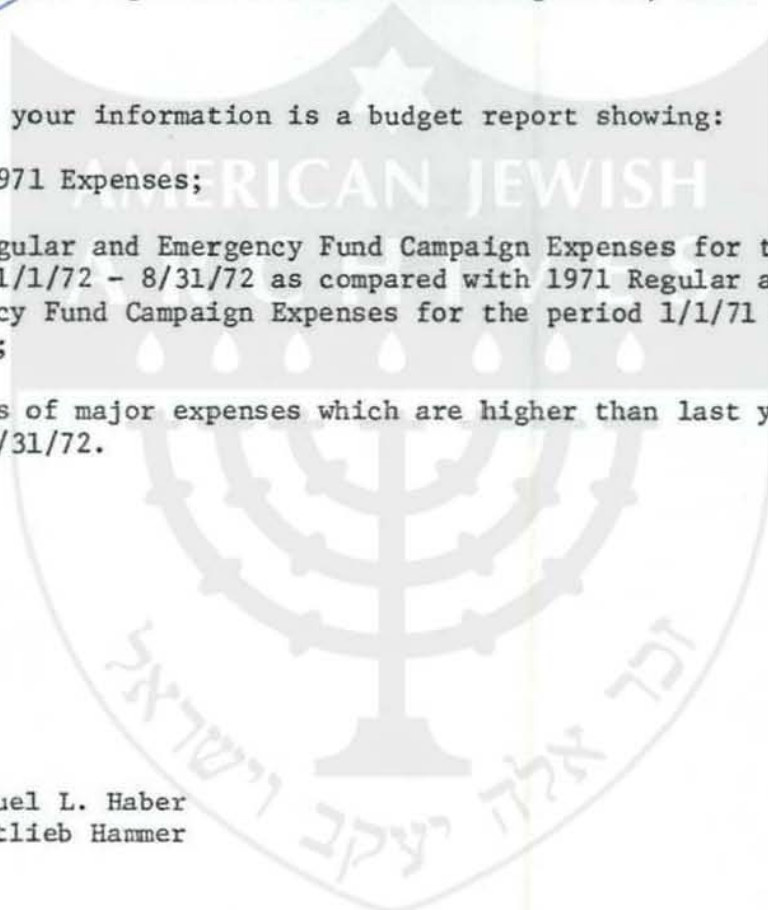
Total 1971 Expenses;

1972 Regular and Emergency Fund Campaign Expenses for the period 1/1/72 - 8/31/72 as compared with 1971 Regular and Emergency Fund Campaign Expenses for the period 1/1/71 - 8/31/71;

Analysis of major expenses which are higher than last year as of 8/31/72.

PZ:ff  
Encs.

cc - Mr. Samuel L. Haber  
Mr. Gottlieb Hammer



TOTAL 1971 CAMPAIGN EXPENSES  
JANUARY 1 - AUGUST 31, 1972 CAMPAIGN EXPENSES  
COMPARED WITH 1971

CONFIDENTIAL

|                                     | <u>TOTAL 1971 EXPENSES</u> |                       | <u>1/1/71-8/31/71</u>   |                       | <u>1/1/72-8/31/72</u>   |                       | <u>1972 BUDGET</u>      |                       |
|-------------------------------------|----------------------------|-----------------------|-------------------------|-----------------------|-------------------------|-----------------------|-------------------------|-----------------------|
|                                     | <u>Regular Campaign</u>    | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> |
| <u>FIELD DEPARTMENT</u>             |                            |                       |                         |                       |                         |                       |                         |                       |
| Payroll                             | \$1,164,550                | \$ --                 | \$ 752,606              | \$ --                 | \$ 833,693              | \$ --                 | \$1,233,000             | \$ --                 |
| Per Diem                            | 220,000                    | 39,242                | 157,378                 | --                    | 157,599                 | 19,015                | 182,000                 | 51,000                |
| Travel                              | 222,530                    | 180,816               | 156,944                 | 42,463                | 193,542                 | 66,199                | 193,000                 | 155,000               |
| Telephone & Miscellaneous           | 128,731                    | --                    | 77,005                  | --                    | 88,696                  | --                    | 120,000                 | --                    |
| Regional Offices - Payroll          | 31,239                     | --                    | 20,627                  | --                    | 21,262                  | --                    | 32,000                  | --                    |
| Regional Offices - Expenses         | 39,088                     | --                    | 25,700                  | --                    | 21,050                  | --                    | 40,000                  | --                    |
|                                     | <u>\$1,806,138</u>         | <u>\$ 220,058</u>     | <u>\$1,190,260</u>      | <u>\$ 42,463</u>      | <u>\$1,315,842</u>      | <u>\$ 85,214</u>      | <u>\$1,800,000</u>      | <u>\$ 206,000</u>     |
| <u>SPEAKERS BUREAU</u>              |                            |                       |                         |                       |                         |                       |                         |                       |
| Payroll                             | \$ 80,882                  | \$ --                 | \$ 54,556               | \$ --                 | \$ 71,190               | \$ --                 | \$ 96,000               | \$ --                 |
| Speakers Fees                       | 125,062                    | 81,891                | 125,063                 | 41,310                | 115,752                 | 29,485                | 115,000                 | 62,000                |
| Speakers Expenses                   | 20,029                     | 18,484                | 20,029                  | 7,274                 | 20,377                  | 14,084                | 20,000                  | 18,000                |
| Speakers Travel                     | 40,967                     | 14,930                | 41,917                  | 6,374                 | 34,304                  | 13,229                | 34,000                  | 23,000                |
| Volunteer Speakers Expenses         | 114,961                    | 386,495               | 119,998                 | 176,283               | 120,873                 | 302,038               | 120,000                 | 300,000               |
| Quota Meetings                      | --                         | 60,681                | --                      | 60,681                | --                      | --                    | --                      | --                    |
| Miscellaneous                       | 18,386                     | --                    | 11,034                  | --                    | 13,916                  | --                    | 15,000                  | --                    |
|                                     | <u>\$ 400,287</u>          | <u>\$ 562,481</u>     | <u>\$ 372,597</u>       | <u>\$291,922</u>      | <u>\$ 376,412</u>       | <u>\$ 358,836</u>     | <u>\$ 400,000</u>       | <u>\$ 403,000</u>     |
| <u>PUBLIC RELATIONS DEPARTMENT</u>  |                            |                       |                         |                       |                         |                       |                         |                       |
| Payroll                             | \$ 300,285                 | \$ --                 | \$ 199,887              | \$ --                 | \$ 194,772              | \$ --                 | \$ 300,000              | \$ --                 |
| Literature & Printing               | 101,145                    | 121,004               | 96,186                  | 80,857                | 102,269                 | 79,928                | 100,000                 | 105,000               |
| Mail Service - Postage              | 20,608                     | 21,051                | 15,581                  | 19,774                | 25,569                  | 8,516                 | 30,000                  | 35,000                |
| Mail Service - Labor                | 11,359                     | 10,483                | 7,833                   | 7,955                 | 6,333                   | 6,115                 | 10,000                  | 20,000                |
| Photos                              | 14,753                     | 9,068                 | 13,518                  | 2,213                 | 4,975                   | 1,200                 | 10,000                  | 15,000                |
| Mats, Artwork & Typography          | 18,590                     | 30,897                | 18,472                  | 14,618                | 16,639                  | 37,020                | 15,000                  | 35,000                |
| Travel                              | 37,563                     | --                    | 25,711                  | --                    | 14,018                  | --                    | 40,000                  | --                    |
| Newspapers & Subscriptions          | 4,090                      | --                    | 2,655                   | --                    | 1,009                   | --                    | 4,000                   | --                    |
| Motion Pictures & TV Spots          | 12,785                     | 125,200               | 6,739                   | 93,130                | 9,201                   | 120,799               | 12,000                  | 188,000               |
| Videocorder Expenses                | --                         | 4,198                 | --                      | 4,198                 | --                      | (300)                 | --                      | 5,000                 |
| Telex                               | --                         | 14,243                | --                      | 8,283                 | --                      | 6,608                 | --                      | 15,000                |
| Advertising Agency Retainer         | 27,104                     | --                    | 16,688                  | --                    | 16,667                  | --                    | 27,000                  | --                    |
| Advertising                         | --                         | 244,141               | --                      | 233,820               | --                      | 159,980               | --                      | 175,000               |
| Clippings                           | 1,348                      | --                    | 1,028                   | --                    | 797                     | --                    | 2,000                   | --                    |
| Public Relations Retainer in Israel | 17,930                     | --                    | 11,978                  | --                    | 3,968                   | --                    | 20,000                  | --                    |
| Publicity Expenses in Israel        | 30,608                     | --                    | 15,318                  | --                    | 11,190                  | --                    | 30,000                  | --                    |
| Pins, Banners, Awards, Misc.        | 37,456                     | 12,139                | 16,033                  | 10,623                | 29,389                  | 6,018                 | 25,000                  | 10,000                |
| J.T.A.                              | 25,000                     | --                    | 20,000                  | --                    | 25,000                  | --                    | 25,000                  | --                    |
| Multi-Media Module                  | --                         | 134,605               | --                      | 94,019                | --                      | 47,129                | --                      | 75,000                |
|                                     | <u>\$ 660,624</u>          | <u>\$ 727,029</u>     | <u>\$ 467,627</u>       | <u>\$569,490</u>      | <u>\$ 461,796</u>       | <u>\$ 473,013</u>     | <u>\$ 650,000</u>       | <u>\$ 678,000</u>     |

TOTAL 1971 CAMPAIGN EXPENSES  
JANUARY 1 - AUGUST 31, 1972 CAMPAIGN EXPENSES  
COMPARED WITH 1971

|                                       | <u>TOTAL 1971 EXPENSES</u> |                       | <u>1/1/71-8/31/71</u>   |                       | <u>1/1/72-8/31/72</u>   |                       | <u>1 9 7 2 B U D G E T</u> |                       |
|---------------------------------------|----------------------------|-----------------------|-------------------------|-----------------------|-------------------------|-----------------------|----------------------------|-----------------------|
|                                       | <u>Regular Campaign</u>    | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u>    | <u>Emergency Fund</u> |
| <u>WOMEN'S DIVISION</u>               |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll                               | \$ 51,385                  | \$ --                 | \$ 34,794               | \$ --                 | \$ 37,473               | \$ --                 | \$ 56,000                  | \$ --                 |
| Expenses                              | 62,986                     | --                    | 39,816                  | --                    | 47,767                  | --                    | 65,000                     | --                    |
|                                       | <u>\$ 114,371</u>          | <u>\$ --</u>          | <u>\$ 74,610</u>        | <u>\$ --</u>          | <u>\$ 85,240</u>        | <u>\$ --</u>          | <u>\$ 121,000</u>          | <u>\$ --</u>          |
| <u>YOUNG LEADERSHIP DEPARTMENT</u>    |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll                               | \$ 60,867                  | \$ --                 | \$ 44,115               | \$ --                 | \$ 39,693               | \$ --                 | \$ 60,000                  | \$ --                 |
| Expenses                              | 49,701                     | --                    | 39,234                  | --                    | 37,881                  | --                    | 50,000                     | --                    |
|                                       | <u>\$ 110,568</u>          | <u>\$ --</u>          | <u>\$ 83,349</u>        | <u>\$ --</u>          | <u>\$ 77,574</u>        | <u>\$ --</u>          | <u>\$ 110,000</u>          | <u>\$ --</u>          |
| <u>ISRAEL OFFICE</u>                  |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll                               | \$ --                      | \$ 57,851             | \$ --                   | \$ 26,169             | \$ --                   | \$ 65,332             | \$ --                      | \$ 97,000             |
| Expenses                              | --                         | 83,832                | --                      | 340                   | --                      | 23,249                | --                         | 55,000                |
|                                       | <u>\$ --</u>               | <u>\$ 141,683</u>     | <u>\$ --</u>            | <u>\$ 26,509</u>      | <u>\$ --</u>            | <u>88,581</u>         | <u>\$ --</u>               | <u>\$ 152,000</u>     |
| <u>OVERSEAS EXPENSES</u>              |                            |                       |                         |                       |                         |                       |                            |                       |
| Overseas Delegation                   | \$ 126,984                 | \$ 158,831            | \$ 75,758               | \$ 98,652             | \$ 36,017               | \$ 34,032             | \$ 115,000                 | \$ 160,000            |
| Operation Israel - Payroll            | --                         | 28,405                | --                      | 13,494                | --                      | 32,713                | --                         | 40,000                |
| Operation Israel - Expenses           | --                         | 128,071               | --                      | 68,664                | --                      | 101,602               | --                         | 100,000               |
| Prime Minister's Mission              | --                         | 152,767               | --                      | 131,247               | --                      | 272,368               | --                         | 272,000               |
| Newspapermen's Missions               | --                         | 77,713                | --                      | 34,610                | --                      | 15                    | --                         | 35,000                |
| Overseas Publicity Mission            | --                         | 18,131                | --                      | 10,331                | --                      | --                    | --                         | --                    |
|                                       | <u>\$ 126,984</u>          | <u>\$ 563,918</u>     | <u>\$ 75,758</u>        | <u>\$ 356,998</u>     | <u>\$ 36,017</u>        | <u>\$ 440,730</u>     | <u>\$ 115,000</u>          | <u>\$ 607,000</u>     |
| <u>UNIVERSITY PROGRAMS DEPARTMENT</u> |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll                               | \$ 59,042                  | \$ --                 | \$ 36,378               | \$ --                 | \$ 45,239               | \$ --                 | \$ 60,000                  | \$ --                 |
| Expenses                              | 67,028                     | --                    | 48,403                  | --                    | 48,917                  | --                    | 65,000                     | --                    |
|                                       | <u>\$ 126,070</u>          | <u>\$ --</u>          | <u>\$ 84,781</u>        | <u>\$ --</u>          | <u>\$ 94,156</u>        | <u>\$ --</u>          | <u>\$ 125,000</u>          | <u>\$ --</u>          |
| <u>RABBINICAL ADVISORY COUNCIL</u>    |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll                               | \$ 47,198                  | \$ --                 | \$ 31,317               | \$ --                 | \$ 35,845               | \$ --                 | \$ 45,000                  | \$ --                 |
| Expenses                              | 39,100                     | --                    | 22,047                  | --                    | 28,634                  | --                    | 23,000                     | --                    |
|                                       | <u>\$ 86,298</u>           | <u>--</u>             | <u>\$ 53,364</u>        | <u>\$ --</u>          | <u>\$ 64,479</u>        | <u>\$ --</u>          | <u>\$ 68,000</u>           | <u>\$ --</u>          |
| <u>CONFERENCE DEPARTMENT</u>          |                            |                       |                         |                       |                         |                       |                            |                       |
| National Meetings                     | \$ 179,936                 | \$ 141,255            | \$ 171,658              | \$ 114,134            | \$ 188,119              | \$ 107,498            | \$ 175,000                 | \$ 95,000             |
| Regional Meetings                     | 26,591                     | --                    | 16,425                  | --                    | 17,148                  | --                    | 25,000                     | 25,000                |
|                                       | <u>\$ 206,527</u>          | <u>\$ 141,255</u>     | <u>\$ 188,083</u>       | <u>\$ 114,134</u>     | <u>\$ 205,267</u>       | <u>\$ 107,498</u>     | <u>\$ 200,000</u>          | <u>\$ 120,000</u>     |

TOTAL 1971 CAMPAIGN EXPENSES  
JANUARY 1 - AUGUST 31, 1972 CAMPAIGN EXPENSES  
COMPARED WITH 1971

|  | <u>TOTAL 1971 EXPENSES</u> |                       | <u>1/1/71-8/31/71</u>   |                       | <u>1/1/72-8/31/72</u>   |                       | <u>1 9 7 2 B U D G E T</u> |                       |
|--|----------------------------|-----------------------|-------------------------|-----------------------|-------------------------|-----------------------|----------------------------|-----------------------|
|  | <u>Regular Campaign</u>    | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u> | <u>Emergency Fund</u> | <u>Regular Campaign</u>    | <u>Emergency Fund</u> |
| <u>CLOSED-CIRCUIT TELECASTS</u>                  | \$ ---                     | \$ 76,833             | \$ ---                  | \$ 76,833             | \$ ---                  | \$ ---                | \$ ---                     | \$ ---                |
| <u>CLOSED-CIRCUIT RADIO BROADCAST</u>            | \$ ---                     | \$ ---                | \$ ---                  | \$ ---                | \$ ---                  | \$ 11,408             | \$ ---                     | \$ 20,000             |
| <u>GENERAL OFFICE</u>                            |                            |                       |                         |                       |                         |                       |                            |                       |
| Payroll  | \$ 717,843                 | \$ ---                | \$ 488,749              | \$ ---                | \$ 479,088              | \$ ---                | \$ 725,000                 | \$ ---                |
| Temporary Staff & Overtime                       | 25,000                     | 312,737               | ---                     | 187,017               | ---                     | 196,423               | 25,000                     | 225,000               |
| Data Processing Costs                            | 102,320                    | 157,988               | 71,905                  | 71,905                | 65,787                  | 98,294                | 100,000                    | 110,000               |
| Rent   | 172,930                    | ---                   | 97,215                  | ---                   | 112,183                 | 6,000                 | 166,000                    | 32,500                |
| Postage  | 49,290                     | ---                   | 29,175                  | ---                   | 30,288                  | ---                   | 50,000                     | ---                   |
| Mail Service - Labor                             | 1,296                      | ---                   | 1,134                   | ---                   | 1,706                   | ---                   | 2,500                      | ---                   |
| Telephone  | 147,057                    | 31,503                | 99,758                  | 6,689                 | 95,514                  | 796                   | 137,000                    | 32,000                |
| Stationery & Office Supplies                     | 59,576                     | 23,626                | 33,406                  | 14,537                | 44,778                  | 19,069                | 50,000                     | 30,000                |
| Telegrams & Cables                               | 9,170                      | 9,099                 | 4,271                   | 4,310                 | 1,610                   | 3,230                 | 8,000                      | 12,000                |
| Furniture & Fixtures                             | 26,116                     | ---                   | 14,635                  | ---                   | 7,419                   | ---                   | 20,000                     | ---                   |
| Insurance  | 161,414                    | ---                   | 115,405                 | ---                   | 169,684                 | ---                   | 165,000                    | 55,000                |
| Equipment Rentals &<br>Office Maintenance        | 22,962                     | 18,351                | 17,956                  | 5,940                 | 12,577                  | 6,716                 | 27,000                     | 18,000                |
| Auditing   | 12,999                     | 11,377                | 5,376                   | 5,000                 | 5,000                   | 5,000                 | 11,000                     | 9,000                 |
| Legal Fees & Expenses                            | 36,839                     | ---                   | 26,026                  | ---                   | 14,293                  | ---                   | 25,000                     | ---                   |
| Unemployment Insurance Tax                       | 5,076                      | ---                   | 491                     | ---                   | 5,412                   | ---                   | 8,500                      | 1,500                 |
| Social Security                                  | 84,568                     | ---                   | 68,383                  | ---                   | 81,949                  | ---                   | 90,000                     | 5,000                 |
| Provision for Severance &<br>Retirement Benefits | 466,000                    | ---                   | 52,789                  | ---                   | 101,716                 | ---                   | 475,000                    | ---                   |
| Miscellaneous                                    | 55,222                     | 22,346                | 31,250                  | 19,727                | 28,543                  | 16,854                | 55,000                     | 25,000                |
|  | <u>\$2,155,678</u>         | <u>\$ 587,027</u>     | <u>\$1,157,924</u>      | <u>\$ 315,125</u>     | <u>\$1,257,547</u>      | <u>\$ 352,382</u>     | <u>\$ 2,140,000</u>        | <u>\$ 555,000</u>     |
| <u>ONE-TIME COST OF OFFICE</u>                   |                            |                       |                         |                       |                         |                       |                            |                       |
| <u>REDESIGN &amp; CONSTRUCTION</u>               | \$ 143,065                 | \$ ---                | \$ ---                  | \$ ---                | \$ 34,866               | \$ ---                | \$ ---                     | \$ ---                |
| <u>RESERVE FOR CONTINGENCIES</u>                 | \$ ---                     | \$ ---                | \$ ---                  | \$ ---                | \$ ---                  | \$ ---                | \$ ---                     | \$ 100,000            |
| <u>T O T A L S</u>                               | <u>\$5,936,610</u>         | <u>\$3,020,284</u>    | <u>\$3,748,353</u>      | <u>\$1,793,474</u>    | <u>\$4,009,196</u>      | <u>\$1,917,662</u>    | <u>\$ 5,729,000</u>        | <u>\$2,841,000</u>    |

UNITED JEWISH APPEAL, INC.

MAJOR EXPENSES WHICH ARE HIGHER THAN LAST YEAR

AS OF 8/31/72

|   | <u>First 8 Months<br/>of 1972</u> | <u>First 8 Months<br/>of 1971</u> | <u>Overage</u> | <u>Explanation for 1972 Overages</u>   |
|---|-----------------------------------|-----------------------------------|----------------|--|
| <u>FIELD DEPARTMENT</u>                           |                                   |                                   |                |  |
| Payroll   | \$ 833,693                        | \$ 752,606                        | \$ 81,087      | Additional field representatives in beginning of 1972; Field Union increments; additional executives hired in latter part of 1971 (e.g. Bassuk, Wenzel). |
| Travel  | \$ 259,741                        | \$ 199,407                        | \$ 60,334      | Overage attributable to new programs - "Operation Upgrade" and "Operation Breakthrough" expenses.  |
| <u>SPEAKERS BUREAU</u>                            |                                   |                                   |                |  |
| E.F. Volunteer Speakers<br>(incl. Quota Meetings) | \$ 302,038                        | \$ 236,964                        | \$ 65,074      | Dayan visit; 21 Russian speakers; 10 resident solicitors.  |
| <u>ISRAEL OFFICE</u>                              | \$ 88,581                         | \$ 26,509                         | \$ 62,072      | Israel office opened during latter part of 1971. However, savings will be effected during latter part of 1972.   |
| <u>OVERSEAS EXPENSES</u>                          |                                   |                                   |                |  |
| Prime Minister's Mission                          | \$ 272,368                        | \$ 131,247                        | \$ 141,121     | Mission held 8/29/71-9/2/71 and charged to 1972.   |
| <u>GENERAL OFFICE</u>                             |                                   |                                   |                |  |
| Data Processing                                   | \$ 164,081                        | \$ 143,810                        | \$ 20,271      | Overage represents costs incurred in bond inventory system urgently recommended by our auditors, Loeb & Troper.  |
| Rent  | \$ 118,183                        | \$ 97,215                         | \$ 20,968      | Additional space on 23rd floor of 1290 Avenue of the Americas as of 7/1/71.  |

UJA - Major Expenses Which are Higher Than Last Year - As of 8/31/72

|  | <u>First 8 Months<br/>of 1972</u> | <u>First 8 Months<br/>of 1971</u> | <u>Overage</u> | <u>Explanation for 1972 Overages</u>  |
|--|-----------------------------------|-----------------------------------|----------------|---|
| Insurance  | \$ 169,684                        | \$ 115,405                        | \$ 54,279      | \$34,500 of difference between 1972 and 1971 represents earlier payment during 1972 of Group Life and Major Medical premiums. Remainder of difference is attributable to improvement in life insurance coverage; improved group dental plan; rates for Blue Cross, Group Dental Insurance and HIP have gone up in 1972. |
| Social Security                                    | \$ 81,949                         | \$ 68,383                         | \$ 13,566      | Social Security costs have gone up due to federal statute.  |
| Provision for Severance<br>and Retirement Benefits | \$ 101,716                        | \$ 52,789                         | \$ 48,927      | Difference attributable to severance paid to Ernest Spickler, who resigned.   |



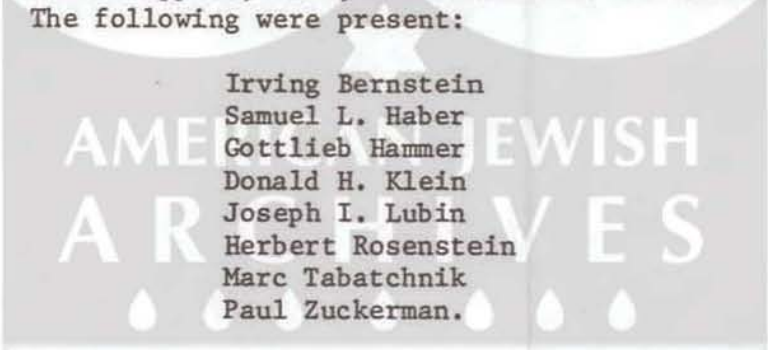
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CONFIDENTIAL

Minutes of Meeting  
of  
BUDGET and FINANCE COMMITTEE  
of the  
UNITED JEWISH APPEAL, INC.

Held on Friday, July 21, 1972  
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A meeting of the Budget and Finance Committee of the United Jewish Appeal, Inc. was held on Friday, July 21, 1972 at 12:00 o'clock Noon at the offices of the United Jewish Appeal, Inc., 1290 Avenue of the Americas, New York, N. Y. 10019. The following were present:



- Irving Bernstein
- Samuel L. Haber
- Gottlieb Hammer
- Donald H. Klein
- Joseph I. Lubin
- Herbert Rosenstein
- Marc Tabatchnik
- Paul Zuckerman.

Mr. Paul Zuckerman stated that he had made a promise that we would conduct frequent Budget and Finance Committee meetings. Mr. Zuckerman indicated that previous attempts had been made to hold meetings which had to be postponed due to non-availability of members of the Budget and Finance Committee.

Mr. Zuckerman analyzed 1972 Campaign achievement with respect to UJA's budget. He indicated that in 1971 UJA's expenses were \$9,000,000 and Campaign achievement was \$339,000,000. We projected a budget of \$8,600,000. Instead of holding the line, the 1972 Campaign is presently \$45,000,000 better than the 1971 Campaign. With attrition, this \$45,000,000 increase will of course decrease. However, Mr. Zuckerman anticipated that the 1972 budget will be about on target with possibly a 3% to 5% variance.

Mr. Irving Bernstein explained that a series of personnel changes are in process which will reduce our expenses by \$100,000 for the remainder of 1972 and possibly reduce 1973 expenses by \$300,000. Mr. Bernstein stressed that we will continue to review the budget in order to do away with programs that are not vital to Campaign operations.

Mr. Zuckerman noted several of the items where additional savings will be effected for the second half of 1972:

- (1) Matthew H. Simon, Assistant Director in Israel, will be leaving UJA.
- (2) The present American executive secretary in Israel will be replaced by an Israeli secretary at a considerable savings.



(3) Mr. Herbert A. Friedman's situation has changed as a result of his move to Israel.

(4) Telex in Israel office has been eliminated.

Mr. Zuckerman said that we are tightening up operations by:

- (1) Limiting salary increases.
- (2) Increasing use of Wats line.
- (3) Reducing use of telephone.
- (4) Cutting unnecessary travel and per diem costs.

Mr. Joseph I. Lubin suggested that as in the past we should spotlight high spots on the budget to emphasize areas of increased costs.

Mr. Zuckerman indicated that this policy would be followed in the future.

Mr. Zuckerman asked why the Insurance and Social Security costs were higher than last year.

Herbert Rosenstein answered that 1972 Insurance costs were higher due to:

- (1) Improvement in Life Insurance coverage for Executives and Field Staff.
- (2) Improved Group Dental Plan for entire staff.
- (3) Rates for Blue Cross, Group Dental Insurance and HIP have gone up in 1972.

Social Security costs have gone up due to Federal Statute.

Mr. Lubin suggested that we prepare a reconciliation of budgetary figures showing expenditures for first six months reconciled to anticipated expenditures for entire year.

Irving Bernstein noted that this would be a good guideline for us as we analyze expenditures and projected expenditures.

Herbert Rosenstein said he would prepare this reconciliation.

Mr. Zuckerman asked why Young Leadership expenses went down.

Irving Bernstein explained that instead of running three Missions, we are now only conducting two, as we have eliminated the Summer Mission.

Mr. Zuckerman asked for an explanation of the rent increase.

Herbert Rosenstein indicated that the increase was due to the additional space on the 23rd floor of 1290 Avenue of the Americas.

Mr. Zuckerman asked why the space was required.

Mr. Bernstein explained that more space was required due to increases in staff and new programs added in 1970 and 1971, such as Operation Break-through, Operation Upgrade, and the College program. Mr. Bernstein noted that the Israel Education Fund shares part of the 23rd floor space but that they pay their own rent.

Mr. Samuel L. Haber asked about expenses for the forthcoming Prime Minister's Mission to be held at the end of August 1972.

Irving Bernstein indicated to the Budget and Finance Committee that we will spend less for this Mission than we did last year.

The Budget and Finance Committee then turned towards the subject of Cash Collections.

Mr. Hammer started the discussion by asking: "How much will UJA collect in calendar year 1972?"

Irving Bernstein replied that according to Herbert Rosenstein's computations the 1972 calendar year cash projection is \$235,000,000, which compares with \$212,000,000 for calendar year 1971. Our target is \$250,000,000 and for the second six months of 1972 we must collect \$143,000,000 in order to achieve this target. However, cash collections in 1972 for all philanthropies has been very poor. For the first six months of 1972 the Bond Organization received in cash \$99,000,000 compared to \$98,000,000 for 1971. We collected \$107,000,000 for the first six months of 1972 compared to \$100,000,000 for last year.

Various programs have been undertaken to accelerate cash. In June, 500 telephone calls were made to every Cash Chairman and Community Chairman. We used the week commemorating the Six Day War of 1967 as a program to get more cash.

Irving Bernstein then presented UJA's Accounts Receivable picture as follows:

|  |                    |
|--|--------------------|
| Accounts Receivable as of 1/1/72                                       | \$129,000,000      |
| Less: Non-liquid assets held by communities (letter stock, land, etc.) | <u>16,000,000</u>  |
| Net Accounts Receivable as of 1/1/72                                   | \$113,000,000      |
| Estimated Pledges for 1972 Campaign                                    | <u>270,000,000</u> |
|  | \$383,000,000      |
| Cash target for calendar year 1972                                     | <u>250,000,000</u> |
| Projected Accounts Receivable 12/31/72                                 | \$133,000,000      |
|  | =====              |

Mr. Zuckerman added a note of optimism. He pointed out that in December 1971 we received \$50,000,000 in cash. He further said that this year we have had an unusual stock market. It has been a very selective market. In December, those who made money on the market will contribute stock. Mr. Zuckerman said he had hopes that this year we will have a \$60,000,000 plus December.

There being no further business to come before the Budget and Finance Committee, the meeting was adjourned.

HR:FF  
8/16/72



*Herbert A. Rosenstein*  
Herbert Rosenstein, Comptroller

*Copy for Rabbi Herbert A. Friedman*

**UNITED JEWISH APPEAL, INC.**

1290 Avenue of the Americas  
New York, N. Y. 10019

C O N F I D E N T I A L

**MEMORANDUM**

Mr. Melvin Dubinsky  
Mr. Max M. Fisher  
Mr. Edward Ginsberg  
Mr. Joseph I. Lubin  
Mr. Louis D. Stern  
Mr. Jack D. Weiler

**Date** April 27, 1972

**To**

**From**

Paul Zuckerman

**Subject**

United Jewish Appeal, Inc. - Budget Report for Three-Month Period ended March 31, 1972.

*File*

Attached for your information is the UJA budgetary report for the first quarter of 1972.

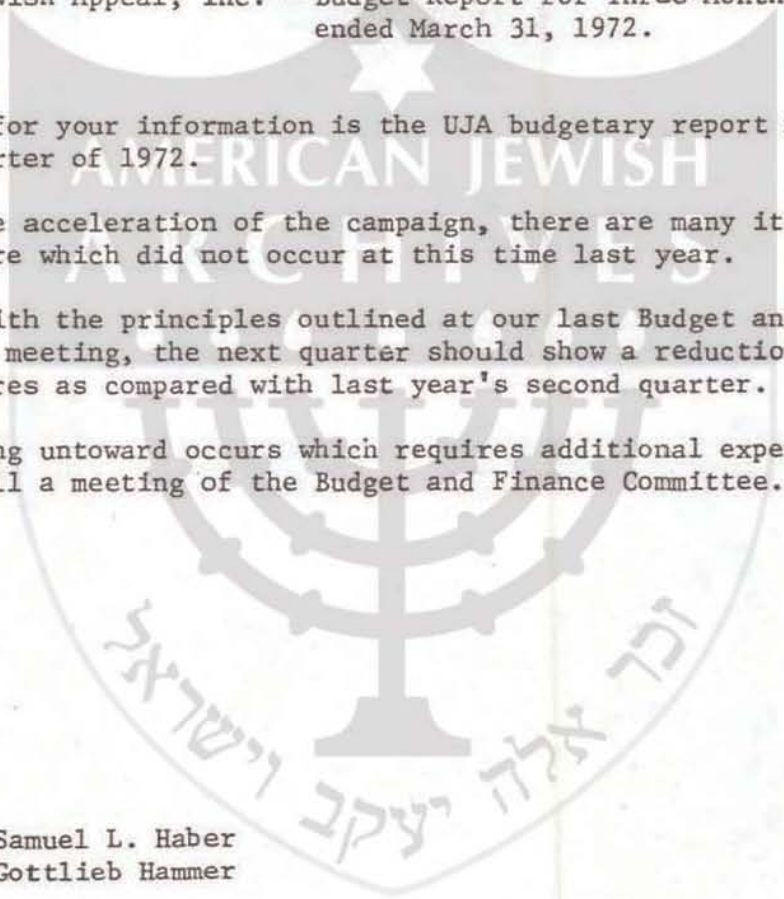
Due to the acceleration of the campaign, there are many items of expenditure which did not occur at this time last year.

In line with the principles outlined at our last Budget and Finance Committee meeting, the next quarter should show a reduction in expenditures as compared with last year's second quarter.

If anything untoward occurs which requires additional expenditures, I will call a meeting of the Budget and Finance Committee.

PZ:ff  
Enc.

cc - Mr. Samuel L. Haber  
Mr. Gottlieb Hammer



TOTAL 1971 CAMPAIGN EXPENSES  
JANUARY 1 - MARCH 31, 1972 CAMPAIGN EXPENSES

COMPARED WITH 1971

|                                     | TOTAL 1971 EXPENSES |                   | 1/1/71-3/31/71    |                  | 1/1/72-3/31/72    |                  | 1972 BUDGET        |                   |
|-------------------------------------|---------------------|-------------------|-------------------|------------------|-------------------|------------------|--------------------|-------------------|
|                                     | Regular Campaign    | Emergency Fund    | Regular Campaign  | Emergency Fund   | Regular Campaign  | Emergency Fund   | Regular Campaign   | Emergency Fund    |
| <u>FIELD DEPARTMENT</u>             |                     |                   |                   |                  |                   |                  |                    |                   |
| Payroll                             | \$1,164,550         | \$ --             | \$ 239,464        | \$ --            | \$ 294,432        | \$ --            | \$1,233,000        | \$ --             |
| Per Diem                            | 220,000             | 39,242            | 56,432            | --               | 69,276            | --               | 182,000            | 51,000            |
| Travel                              | 225,711             | 180,816           | 47,128            | 12,463           | 59,403            | 18,109           | 193,000            | 155,000           |
| Telephone & Miscellaneous           | 128,731             | --                | 23,485            | --               | 36,459            | --               | 120,000            | --                |
| Regional Offices - Payroll          | 31,239              | --                | 7,510             | --               | 7,131             | --               | 32,000             | --                |
| Regional Offices - Expenses         | 36,336              | --                | 10,370            | --               | 3,913             | --               | 40,000             | --                |
|                                     | <u>\$1,806,567</u>  | <u>\$ 220,058</u> | <u>\$ 384,389</u> | <u>\$ 12,463</u> | <u>\$ 470,614</u> | <u>\$ 18,109</u> | <u>\$1,800,000</u> | <u>\$ 206,000</u> |
| <u>SPEAKERS BUREAU</u>              |                     |                   |                   |                  |                   |                  |                    |                   |
| Payroll                             | \$ 80,882           | \$ --             | \$ 16,935         | \$ --            | \$ 24,262         | \$ --            | \$ 96,000          | \$ --             |
| Speakers Fees                       | 125,062             | 81,741            | 61,681            | --               | 46,200            | --               | 115,000            | 62,000            |
| Speakers Expenses                   | 20,029              | 18,434            | 10,321            | --               | 16,593            | --               | 20,000             | 18,000            |
| Speakers Travel                     | 41,917              | 14,930            | 13,732            | --               | 13,519            | --               | 34,000             | 23,000            |
| Volunteer Speakers Expenses         | 119,869             | 388,137           | 47,765            | 99,112           | 58,973            | 155,360          | 120,000            | 300,000           |
| Quota Meetings                      | --                  | 60,681            | --                | 60,681           | --                | --               | --                 | --                |
| Miscellaneous                       | 18,386              | --                | 3,269             | --               | 9,056             | --               | 15,000             | --                |
|                                     | <u>\$ 406,145</u>   | <u>\$ 563,923</u> | <u>\$ 153,703</u> | <u>\$159,793</u> | <u>\$ 168,603</u> | <u>\$155,360</u> | <u>\$ 400,000</u>  | <u>\$ 403,000</u> |
| <u>PUBLIC RELATIONS DEPARTMENT</u>  |                     |                   |                   |                  |                   |                  |                    |                   |
| Payroll                             | \$ 300,285          | \$ --             | \$ 64,229         | \$ --            | \$ 68,715         | \$ --            | \$ 300,000         | \$ --             |
| Literature & Printing               | 101,145             | 121,004           | 68,213            | 37,498           | 81,090            | 40,745           | 100,000            | 105,000           |
| Mail Service - Postage              | 20,608              | 21,051            | 12,502            | 3,763            | 20,695            | 5,630            | 30,000             | 35,000            |
| Mail Service - Labor                | 11,359              | 10,483            | 2,356             | 2,562            | 2,886             | 2,907            | 10,000             | 20,000            |
| Photos                              | 14,753              | 9,068             | 4,756             | 2,154            | 2,246             | 2,251            | 10,000             | 15,000            |
| Mats, Artwork & Typography          | 18,472              | 30,779            | 12,165            | 8,281            | 12,546            | 26,462           | 15,000             | 35,000            |
| Travel                              | 37,806              | --                | 11,979            | --               | 4,673             | --               | 40,000             | --                |
| Newspapers & Subscriptions          | 4,090               | --                | 577               | --               | 287               | --               | 4,000              | --                |
| Motion Pictures & TV Spots          | 9,785               | 111,084           | 6,398             | 13,051           | 81                | 103,118          | 12,000             | 188,000           |
| Videocorder Expenses                | --                  | 4,198             | --                | 1,962            | --                | --               | --                 | 5,000             |
| Telex                               | --                  | 14,243            | --                | 1,159            | --                | 2,820            | --                 | 15,000            |
| Advertising Agency Retainer         | 27,104              | --                | 6,000             | --               | 2,083             | --               | 27,000             | --                |
| Advertising                         | --                  | 244,141           | --                | 30,665           | --                | 29,096           | --                 | 175,000           |
| Clippings                           | 1,348               | --                | 578               | --               | 80                | --               | 2,000              | --                |
| Public Relations Retainer in Israel | 17,930              | --                | 4,586             | --               | 1,190             | --               | 20,000             | --                |
| Publicity Expenses in Israel        | 30,608              | --                | 2,932             | --               | 2,634             | --               | 30,000             | --                |
| Pins, Banners, Awards, Misc.        | 37,456              | 12,139            | 5,909             | 2,553            | 12,964            | 5,000            | 25,000             | 10,000            |
| J. T. A.                            | 25,000              | --                | 7,000             | --               | --                | --               | 25,000             | --                |
| Multi Media Module                  | --                  | 134,605           | --                | 68,381           | --                | 4,097            | --                 | 75,000            |
|                                     | <u>\$ 657,749</u>   | <u>\$ 712,795</u> | <u>\$ 210,180</u> | <u>\$172,029</u> | <u>\$ 212,170</u> | <u>\$222,126</u> | <u>\$ 650,000</u>  | <u>\$ 678,000</u> |

TOTAL 1971 CAMPAIGN EXPENSES  
 JANUARY 1 - MARCH 31, 1972 CAMPAIGN EXPENSES

COMPARED WITH 1971

|                                       | TOTAL 1971 EXPENSES |                   | 1/1/71-3/31/71    |                   | 1/1/72-3/31/72    |                   | 1972 BUDGET       |                   |
|---------------------------------------|---------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|-------------------|
|                                       | Regular Campaign    | Emergency Fund    | Regular Campaign  | Emergency Fund    | Regular Campaign  | Emergency Fund    | Regular Campaign  | Emergency Fund    |
| <u>WOMEN'S DIVISION</u>               |                     |                   |                   |                   |                   |                   |                   |                   |
| Payroll                               | \$ 51,385           | \$ ---            | \$ 11,414         | \$ ---            | \$ 12,601         | \$ ---            | \$ 56,000         | \$ ---            |
| Expenses                              | 63,346              | ---               | 35,301            | ---               | 30,279            | ---               | 65,000            | ---               |
|                                       | <u>\$ 114,731</u>   | <u>\$ ---</u>     | <u>\$ 46,715</u>  | <u>\$ ---</u>     | <u>\$ 42,880</u>  | <u>\$ ---</u>     | <u>\$ 121,000</u> | <u>\$ ---</u>     |
| <u>YOUNG LEADERSHIP DEPARTMENT</u>    |                     |                   |                   |                   |                   |                   |                   |                   |
| Payroll                               | \$ 60,867           | \$ ---            | \$ 13,500         | \$ ---            | \$ 15,054         | \$ ---            | \$ 60,000         | \$ ---            |
| Expenses                              | 49,431              | ---               | 9,328             | ---               | 8,460             | ---               | 50,000            | ---               |
|                                       | <u>\$ 110,298</u>   | <u>\$ ---</u>     | <u>\$ 22,828</u>  | <u>\$ ---</u>     | <u>\$ 23,514</u>  | <u>\$ ---</u>     | <u>\$ 110,000</u> | <u>\$ ---</u>     |
| <u>ISRAEL OFFICE</u>                  |                     |                   |                   |                   |                   |                   |                   |                   |
| Payroll                               | \$ ---              | \$ 57,851         | \$ ---            | \$ 8,723          | \$ ---            | \$ 23,053         | \$ ---            | \$ 97,000         |
| Expenses                              | ---                 | 83,887            | ---               | 125               | ---               | 8,761             | ---               | 55,000            |
|                                       | <u>\$ ---</u>       | <u>\$ 141,738</u> | <u>\$ ---</u>     | <u>\$ 8,848</u>   | <u>\$ ---</u>     | <u>\$ 31,814</u>  | <u>\$ ---</u>     | <u>\$ 152,000</u> |
| <u>OVERSEAS EXPENSES</u>              |                     |                   |                   |                   |                   |                   |                   |                   |
| Overseas Delegation                   | \$ 117,217          | \$ 162,524        | \$ 24,683         | \$ 7,403          | \$ 8,661          | \$ 9,973          | \$ 115,000        | \$ 160,000        |
| Operation Israel - Payroll            | ---                 | 28,405            | ---               | 10,742            | ---               | 13,188            | ---               | 40,000            |
| Operation Israel - Expenses           | ---                 | 128,071           | ---               | ---               | ---               | ---               | ---               | 100,000           |
| Prime Minister's Mission              | ---                 | 152,841           | ---               | 131,118           | ---               | 272,368           | ---               | 272,000           |
| Newspapermen's Missions               | ---                 | 79,167            | ---               | 7,913             | ---               | ---               | ---               | 35,000            |
| Overseas Publicity Mission            | ---                 | 18,131            | ---               | ---               | ---               | ---               | ---               | ---               |
|                                       | <u>\$ 117,217</u>   | <u>\$ 569,139</u> | <u>\$ 24,683</u>  | <u>\$ 157,176</u> | <u>\$ 8,661</u>   | <u>\$ 295,529</u> | <u>\$ 115,000</u> | <u>\$ 607,000</u> |
| <u>UNIVERSITY PROGRAMS DEPARTMENT</u> |                     |                   |                   |                   |                   |                   |                   |                   |
| Payroll                               | \$ 59,042           | \$ ---            | \$ 12,261         | \$ ---            | \$ 17,356         | \$ ---            | \$ 60,000         | \$ ---            |
| Expenses                              | 67,028              | ---               | 26,109            | ---               | 24,067            | ---               | 65,000            | ---               |
|                                       | <u>\$ 126,070</u>   | <u>\$ ---</u>     | <u>\$ 38,370</u>  | <u>\$ ---</u>     | <u>\$ 41,423</u>  | <u>\$ ---</u>     | <u>\$ 125,000</u> | <u>\$ ---</u>     |
| <u>RABBINICAL ADVISORY COUNCIL</u>    |                     |                   |                   |                   |                   |                   |                   |                   |
| Payroll                               | \$ 47,198           | \$ ---            | \$ 8,249          | \$ ---            | \$ 12,002         | \$ ---            | \$ 45,000         | \$ ---            |
| Expenses                              | 39,547              | ---               | 11,530            | ---               | 14,173            | ---               | 23,000            | ---               |
|                                       | <u>\$ 86,745</u>    | <u>\$ ---</u>     | <u>\$ 19,779</u>  | <u>\$ ---</u>     | <u>\$ 26,175</u>  | <u>\$ ---</u>     | <u>\$ 68,000</u>  | <u>\$ ---</u>     |
| <u>CONFERENCE DEPARTMENT</u>          |                     |                   |                   |                   |                   |                   |                   |                   |
| National Meetings                     | \$ 179,936          | \$ 141,255        | \$ 154,604        | \$ 115,133        | \$ 154,888        | \$ 76,688         | \$ 175,000        | \$ 95,000         |
| Regional Meetings                     | 26,591              | ---               | 9,903             | ---               | 8,472             | ---               | 25,000            | 25,000            |
|                                       | <u>\$ 206,527</u>   | <u>\$ 141,255</u> | <u>\$ 164,507</u> | <u>\$ 115,133</u> | <u>\$ 163,360</u> | <u>\$ 76,688</u>  | <u>\$ 200,000</u> | <u>\$ 120,000</u> |

TOTAL 1971 CAMPAIGN EXPENSES  
 JANUARY 1 - MARCH 31, 1972 CAMPAIGN EXPENSES  
 COMPARED WITH 1971

|  | TOTAL 1971 EXPENSES |                | 1/1/71-3/31/71   |                | 1/1/72-3/31/72   |                | 1 9 7 2 B U D G E T |                |
|--|---------------------|----------------|------------------|----------------|------------------|----------------|---------------------|----------------|
|  | Regular Campaign    | Emergency Fund | Regular Campaign | Emergency Fund | Regular Campaign | Emergency Fund | Regular Campaign    | Emergency Fund |
| <u>CLOSED CIRCUIT TELECASTS</u>                                  | \$ ---              | \$ 76,833      | \$ ---           | \$ 75,940      | \$ ---           | \$ ---         | \$ ---              | \$ ---         |
| <u>CLOSED CIRCUIT RADIO BROADCAST</u>                            | \$ ---              | \$ ---         | \$ ---           | \$ ---         | \$ ---           | \$ 10,056      | \$ ---              | \$ 20,000      |
| <u>GENERAL OFFICE</u>  |                     |                |                  |                |                  |                |                     |                |
| Payroll  | \$ 717,593          | \$ ---         | \$ 161,341       | \$ ---         | \$ 165,653       | \$ ---         | \$ 725,000          | \$ ---         |
| Temporary Staff & Overtime                                       | 25,000              | 255,566        | ---              | 64,820         | ---              | 62,095         | 25,000              | 225,000        |
| Data Processing Costs  | 102,320             | 157,988        | 16,022           | 16,022         | 19,749           | 19,941         | 100,000             | 110,000        |
| Rent   | 172,930             | ---            | 31,315           | ---            | 40,545           | 6,000          | 166,000             | 32,500         |
| Postage  | 49,290              | ---            | 14,180           | ---            | 11,931           | ---            | 50,000              | ---            |
| Mail Service - Labor   | 1,296               | ---            | 614              | ---            | ---              | ---            | 2,500               | ---            |
| Telephone  | 147,057             | 31,503         | 42,690           | ---            | 40,466           | 796            | 137,000             | 32,000         |
| Stationery & Office Supplies                                     | 59,576              | 23,626         | 9,060            | 811            | 14,597           | 4,736          | 50,000              | 30,000         |
| Telegrams & Cables   | 9,170               | 9,046          | 2,612            | 2,978          | 1,582            | 969            | 8,000               | 12,000         |
| Furniture & Fixtures   | 26,116              | ---            | 1,251            | ---            | 3,871            | ---            | 20,000              | ---            |
| Insurance  | 160,690             | ---            | 57,584           | ---            | 62,180           | ---            | 165,000             | 55,000         |
| Equipment Rentals & Office Maintenance                           | 22,962              | 18,351         | 9,050            | 1,712          | 4,593            | 2,904          | 27,000              | 18,000         |
| Auditing   | 10,998              | 9,377          | ---              | ---            | ---              | ---            | 11,000              | 9,000          |
| Legal Fees & Expenses  | 36,589              | ---            | 5,126            | ---            | 4,940            | ---            | 25,000              | ---            |
| Unemployment Insurance Tax                                       | 5,076               | ---            | ---              | ---            | 63               | ---            | 8,500               | 1,500          |
| Social Security  | 84,606              | ---            | 29,643           | ---            | 35,761           | ---            | 90,000              | 5,000          |
| Provision for Severance & Retirement Benefits                    | 466,000             | ---            | 40,970           | ---            | 68,542           | ---            | 475,000             | ---            |
| Miscellaneous  | 54,626              | 22,346         | 9,861            | 8,614          | 9,367            | 8,267          | 55,000              | 25,000         |
|  | \$2,151,895         | \$ 527,803     | \$ 431,319       | \$ 94,957      | \$ 483,840       | \$105,708      | \$2,140,000         | \$ 555,000     |
| <u>ONE-TIME COST OF OFFICE RE-<br/>DESIGN &amp; CONSTRUCTION</u> | \$ 142,251          | \$ ---         | \$ ---           | \$ ---         | \$ 2,860         | \$ ---         | \$ ---              | \$ ---         |
| <u>RESERVE FOR CONTINGENCIES</u>                                 | \$ ---              | \$ ---         | \$ ---           | \$ ---         | \$ ---           | \$ ---         | \$ ---              | \$ 100,000     |
| <u>T O T A L S</u>   | \$5,926,195         | \$2,953,544    | \$1,496,473      | \$796,339      | \$1,644,100      | \$915,390      | \$5,729,000         | \$2,841,000    |

From the desk of HERBERT ROSENSTEIN

March 13, 1972

To: Rabbi Herbert A. Friedman





Minutes of Meeting  
of  
BUDGET and FINANCE COMMITTEE  
of the  
UNITED JEWISH APPEAL, INC.

Held on Friday, March 3, 1972

=====

A meeting of the Budget and Finance Committee of the United Jewish Appeal, Inc. was held on Friday, March 3, 1972 at 3:30 P.M. at the Americana Hotel, New York City. The following were present:

Living Bernstein  
Melvin Dubinsky  
Max M. Fisher  
Samuel L. Haber  
Gottlieb Hammer  
Donald H. Klein  
Herbert Rosenstein  
Louis D. Stern  
Paul Zuckerman.

Mr. Paul Zuckerman was Chairman for the meeting.

Mr. Zuckerman said although the UJA expected to raise more in 1972 than 1971, the 1972 Budget was being projected at \$251,000 less than was actually spent in 1971.

Mr. Max M. Fisher pointed out that 1971 expenses were more than \$1,000,000 over the 1971 budget.

Mr. Bernstein said that in the course of the year as new programs come up the General Chairman of UJA usually calls the Chairmen of the Joint Distribution Committee and United Israel Appeal for their budgetary approval. Mr. Bernstein suggested that there should be more frequent meetings of the Budget and Finance Committee. The members of the Budget and Finance Committee present were unanimously in favor of this.

Mr. Fisher said he reviewed the budget and pinpointed certain expenditures which were high as follows:

(1) Prime Minister's Mission -- Mr. Fisher noted that the cost of the Prime Minister's Mission held 8/29/71 - 9/2/71 amounted to \$272,000. He said we can be subject to criticism on this expenditure because we footed the bill for those who contribute the most money and could best afford to pay their own way. Mr. Bernstein said that he believed that \$272,000 was high for the Prime Minister's Mission and we might have done it a different way. However, Mr. Bernstein stressed that the program was crucial to the 1972 Campaign and we should continue it, but possibly in a modified form; i.e., not using a Jumbo Jet. Mr. Zuckerman noted that we did receive an additional \$4,000,000 from the participants of this Mission.

Mr. Dubinsky added that because of participation in this Mission, these people help raise more money in their home communities. It was unanimously agreed by the Budget and Finance Committee that we should not give up this program but rather do it at a lower cost.

(2) National Annual Dinner and Inaugural Dinner -- Mr. Fisher stated that if we charged more at these dinners we could save more. We presently charge \$30.00 for the Inaugural Dinner and \$25.00 for the National Annual Dinner. Mr. Bernstein said that we charge almost enough to cover the amount paid per plate and that the expenditure shown on the budget report is comprised of other expenses such as bringing over visitors from overseas. Mr. Bernstein added that if we go higher than \$50.00 per couple for the National Annual Dinner we will price ourselves out of the market. It was agreed to leave the prices at present levels but also to analyze the total costs for the dinners in order to determine where additional savings might be possible.

(3) Israel Office -- It was noted by Mr. Zuckerman that the operation of the Israel Office will be modified during the year.

Mr. Louis D. Stern said that although there should be flexibility in the budget, nevertheless a meeting of the Budget and Finance Committee should be called at various times during the year for approval of major new items.

Mr. Dubinsky suggested that the budget of \$8,470,000 should be approved, plus a Contingency Fund of \$100,000 be added for unforeseen unbudgeted expenditures which may be required as the 1972 Campaign progresses.

Mr. Samuel L. Haber said that the Contingency Fund should be for smaller items, while Budget and Finance Committee meetings should be held during the year for larger items.

Mr. Bernstein explained that for 1972 the Administration of the UJA has instituted several changes which will afford greater budgetary control, as follows:

1. Department heads have individual responsibility for their departmental budgets.
2. A staff Budget Committee has been appointed for maintenance of budgetary control.
3. There will be greater utilization of the UJA Budget and Finance Committee.

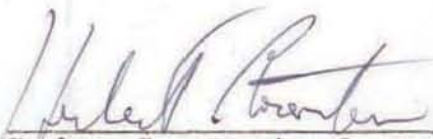
Mr. Zuckerman said that the Budget and Finance Committee would meet more often and that progress reports should be prepared monthly. Mr. Rosenstein indicated that a progress report for the first two months of 1972 would be ready shortly.

Mr. Gottlieb Hammer suggested that we have a composite budget and not separate Regular Campaign budget and Emergency Fund budget. Mr. Fisher also thought that this was a feasible suggestion. Mr. Bernstein said that UJA would prefer such combination provided JDC were protected.

The Budget and Finance Committee agreed that a composite budget would be preferable to a budget split between the Regular Campaign and the Emergency Fund. Mr. Haber said he would want to discuss the composite budget concept with Mr. Edward Ginsberg, Chairman of JDC, subsequent to which he would further discuss the matter with Mr. Hammer.

The Budget and Finance Committee unanimously approved the 1972 budget of \$8,470,000, plus a \$100,000 Contingency Fund.

There being no further business to come before the Budget and Finance Committee, the meeting was adjourned.

  
Herbert Rosenstein, Comptroller

HR:FF  
3/14/72



UJA  
FROM THE  
GENERAL  
CHAIRMAN

HAF

file  
UJA Budget - 1972

February 8, 1972

Mr. Max M. Fisher  
2209 Fisher Building  
Detroit, Michigan 48202

Dear Max:

I am attaching for your attention a copy of the proposed budget for 1972 for the United Jewish Appeal.

It was my intention to call a Budget Committee meeting as early as possible in 1972, but I have not been able to do so as the members of the committee have been away from New York in Florida, California and Israel.

Therefore, I am sending this budget to you so that you have an opportunity to review it before our next meeting, which I would like to call in the UJA board room on March 3rd at 10:00 A.M. I am selecting this date because it is the same date as a UJA Executive Committee meeting, and I, therefore, believe that all the members of the Budget & Finance Committee will be available for the meeting.

I have spent many hours on the budget with Irving Bernstein, in our combined effort to bring in a budget which will be less than the expenditures of the past year and yet will permit us to conduct a vigorous and aggressive campaign in 1972 which will realize more for the UJA constituent agencies than the UJA ever raised before.

Your comments on this budget will be deeply appreciated. Please call or write either to me or to Irving Bernstein.

Sincerely,

Paul Zuckerman  
General Chairman

PZ/sp  
Atts.

Paul Zuckerman

PROPOSED BUDGET 1972  
COMPARISON - 1971 EXPENSES

|                                    | <u>1 9 7 1 B U D G E T</u> |                       | <u>TOTAL ESTIMATED 1971 EXPENSES</u> |                       | <u>1 9 7 2 B U D G E T</u> |                       |
|------------------------------------|----------------------------|-----------------------|--------------------------------------|-----------------------|----------------------------|-----------------------|
|                                    | <u>Regular Campaign</u>    | <u>Emergency Fund</u> | <u>Regular Campaign</u>              | <u>Emergency Fund</u> | <u>Regular Campaign</u>    | <u>Emergency Fund</u> |
| <u>FIELD DEPARTMENT</u>            |                            |                       |                                      |                       |                            |                       |
| Payroll                            | \$1,095,000                | \$ --                 | \$1,164,500                          | \$ --                 | \$1,233,000                | \$ --                 |
| Per Diem                           | 220,000                    | 30,000                | 220,000                              | 35,000                | 182,000                    | 51,000                |
| Travel                             | 225,000                    | 60,000                | 225,000                              | 140,000               | 193,000                    | 155,000               |
| Telephone & Miscellaneous          | 90,000                     | --                    | 121,000                              | --                    | 120,000                    | --                    |
| Regional Offices-Payroll           | 30,000                     | --                    | 31,000                               | --                    | 32,000                     | --                    |
| Regional Offices-Expenses          | 30,000                     | --                    | 40,000                               | --                    | 40,000                     | --                    |
|                                    | <u>\$1,690,000</u>         | <u>\$ 90,000</u>      | <u>\$1,801,500</u>                   | <u>\$ 175,000</u>     | <u>\$1,800,000</u>         | <u>\$ 206,000</u>     |
| <u>SPEAKERS BUREAU</u>             |                            |                       |                                      |                       |                            |                       |
| Payroll                            | \$ 75,000                  | \$ --                 | \$ 81,000                            | \$ --                 | \$ 96,000                  | \$ --                 |
| Speakers Fees                      | 125,000                    | 52,000                | 125,000                              | 80,000                | 115,000                    | 62,000                |
| Speakers Expenses                  | 20,000                     | 8,000                 | 20,000                               | 18,000                | 20,000                     | 18,000                |
| Speakers Travel                    | 40,000                     | 15,000                | 42,000                               | 15,000                | 34,000                     | 23,000                |
| Volunteer Speakers Expenses        | 120,000                    | 200,000               | 120,000                              | 350,000               | 120,000                    | 300,000               |
| Quota Meetings                     | --                         | 75,000                | --                                   | 61,000                | --                         | --                    |
| Miscellaneous                      | 15,000                     | --                    | 17,000                               | --                    | 15,000                     | --                    |
|                                    | <u>\$ 395,000</u>          | <u>\$350,000</u>      | <u>\$ 405,000</u>                    | <u>\$ 524,000</u>     | <u>\$ 400,000</u>          | <u>\$ 403,000</u>     |
| <u>PUBLIC RELATIONS DEPARTMENT</u> |                            |                       |                                      |                       |                            |                       |
| Payroll                            | \$ 275,000                 | \$ --                 | \$ 300,000                           | \$ --                 | \$ 300,000                 | \$ --                 |
| Literature & Printing              | 100,000                    | 120,000               | 100,000                              | 122,000               | 100,000                    | 105,000               |
| Mail Service-Postage               | 30,000                     | 40,000                | 21,000                               | 22,000                | 30,000                     | 35,000                |
| Mail Service-Labor                 | 11,500                     | 21,500                | 11,000                               | 11,000                | 10,000                     | 20,000                |
| Photos                             | 10,000                     | 5,000                 | 15,000                               | 10,000                | 10,000                     | 15,000                |
| Mats, Artwork, Typography          | 15,000                     | 15,000                | 18,500                               | 31,000                | 15,000                     | 35,000                |
| Travel                             | 15,000                     | --                    | 37,000                               | --                    | 40,000                     | --                    |
| Newspapers & Subscriptions         | 4,000                      | --                    | 4,000                                | --                    | 4,000                      | --                    |
| Motion Pictures & TV Spots         | 15,000                     | 49,000                | 10,000                               | 115,000               | 12,000                     | 188,000               |
| Videocorder Expenses               | --                         | 2,000                 | --                                   | 5,000                 | --                         | 5,000                 |
| Telex                              | --                         | 25,000                | --                                   | 15,000                | --                         | 15,000                |
| Advertising Agency Retainer        | 25,000                     | --                    | 27,000                               | --                    | 27,000                     | --                    |
| Advertising                        | --                         | 175,000               | --                                   | 247,000               | --                         | 175,000               |
| Clippings                          | 4,000                      | --                    | 2,000                                | --                    | 2,000                      | --                    |
| Public Relations Retainer          |                            |                       |                                      |                       |                            |                       |
| in Israel                          | 18,000                     | --                    | 18,000                               | --                    | 20,000                     | --                    |
| Publicity Expenses in Israel       | 20,000                     | --                    | 30,000                               | --                    | 30,000                     | --                    |
| Pins, Banners, Awards, Misc.       | 25,000                     | 10,000                | 36,000                               | 12,000                | 25,000                     | 10,000                |
| J. T. A.                           | 25,000                     | --                    | 25,000                               | --                    | 25,000                     | --                    |
| Multi Media Module                 | --                         | 50,000                | --                                   | 135,000               | --                         | 75,000                |
|                                    | <u>\$ 592,500</u>          | <u>\$512,500</u>      | <u>\$ 654,500</u>                    | <u>\$ 725,000</u>     | <u>\$ 650,000</u>          | <u>\$ 678,000</u>     |



**PROPOSED BUDGET 1972**  
**COMPARISON - 1971 EXPENSES (continued)**

|   | 1971 BUDGET         |                    | TOTAL ESTIMATED<br>1971 EXPENSES |                    | 1972 BUDGET         |                    |
|---|---------------------|--------------------|----------------------------------|--------------------|---------------------|--------------------|
|   | Regular<br>Campaign | Emergency<br>Fund  | Regular<br>Campaign              | Emergency<br>Fund  | Regular<br>Campaign | Emergency<br>Fund  |
| <b>GENERAL OFFICE</b>   |                     |                    |                                  |                    |                     |                    |
| Payroll   | \$ 710,000          | \$ --              | \$ 720,000                       | \$ --              | \$ 725,000          | \$ --              |
| Temporary Staff & Overtime  | 25,000              | 200,000            | 25,000                           | 255,000            | 25,000              | 225,000            |
| Data Processing Costs   | 101,000             | 121,000            | 105,000                          | 150,000            | 100,000             | 110,000            |
| Rent  | 145,000             | --                 | 166,000                          | --                 | 166,000             | 32,500             |
| Postage   | 45,000              | --                 | 49,000                           | --                 | 50,000              | --                 |
| Mail Service-Labor  | 10,000              | --                 | 1,500                            | --                 | 2,500               | --                 |
| Telephone   | 110,000             | 20,000             | 137,000                          | 32,000             | 137,000             | 32,000             |
| Stationery & Office Supplies  | 55,000              | 30,000             | 56,000                           | 22,000             | 50,000              | 30,000             |
| Telegrams & Cables  | 8,000               | 27,000             | 7,000                            | 7,000              | 8,000               | 12,000             |
| Furniture & Fixtures  | 15,000              | --                 | 20,000                           | --                 | 20,000              | --                 |
| Insurance   | 167,500             | --                 | 165,000                          | --                 | 165,000             | 55,000             |
| Equipment Rentals &<br>Office Maintenance                           | 22,000              | 3,000              | 27,000                           | 16,000             | 27,000              | 18,000             |
| Auditing  | 10,000              | 8,000              | 11,000                           | 9,000              | 11,000              | 9,000              |
| Legal Fees & Expenses   | 25,000              | --                 | 37,500                           | --                 | 25,000              | --                 |
| Unemployment Insurance Tax  | 20,000              | --                 | 6,000                            | --                 | 8,500               | 1,500              |
| Social Security   | 78,000              | --                 | 85,000                           | --                 | 90,000              | 5,000              |
| Provision for Severance &<br>Retirement Benefits                    | 435,000             | --                 | 466,000                          | --                 | 475,000             | --                 |
| Miscellaneous   | 60,000              | 20,000             | 55,000                           | 24,000             | 55,000              | 25,000             |
|   | <u>\$2,041,500</u>  | <u>\$429,000</u>   | <u>\$2,139,000</u>               | <u>\$ 515,000</u>  | <u>\$2,140,000</u>  | <u>\$ 555,000</u>  |
| <b>ONE-TIME COST OF<br/>OFFICE RE-DESIGN &amp;<br/>CONSTRUCTION</b> | \$ --               | \$ --              | \$ 140,000                       | \$ --              | \$ --               | \$ --              |
| <b>TOTALS</b>   | <u>\$5,428,000</u>  | <u>\$2,026,500</u> | <u>\$5,890,000</u>               | <u>\$2,821,000</u> | <u>\$5,729,000</u>  | <u>\$2,741,000</u> |

ANALYSIS OF PAYROLL BY DEPARTMENTS

1971 CAMPAIGN and PROPOSED 1972 BUDGET

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|  | <u># of<br/>Employees<br/>as of<br/>12/31/71</u> | <u>Total<br/>Estimated<br/>1971<br/>Payroll</u> | <u>1971<br/>Payroll<br/>Budget</u> | <u>1972<br/>Payroll<br/>Budget</u> | <u># of<br/>Employees<br/>Projected<br/>for 1972</u> |
|--|--|---|------------------------------------|------------------------------------|--|
| Field Department                                     | 77   | \$1,195,500                                     | \$1,125,000                        | \$1,265,000                        | 73   |
| Speakers Bureau                                      | 8  | 81,000  | 75,000                             | 96,000                             | 8  |
| Public Relations Department                          | 20   | 300,000   | 275,000                            | 300,000                            | 20   |
| Women's Division                                     | 4  | 51,000  | 58,000                             | 56,000                             | 4  |
| Young Leadership Department                          | 4  | 61,000  | 67,000                             | 60,000                             | 4  |
| University Program Department                        | 8  | 60,000  | 58,000                             | 60,000                             | 7  |
| Rabbinical Advisory Program                          | 3  | 47,000  | 36,000                             | 45,000                             | 2  |
| General Office                                       | 55   | 745,000   | 735,000                            | 750,000                            | 55   |
| <b>Total Payroll Charged<br/>to Regular Campaign</b> | <b>179</b>                                       | <b>\$2,540,500</b>                              | <b>\$2,429,000</b>                 | <b>\$2,632,000</b>                 | <b>173</b>   |
| <u>Emergency Fund</u>                                |  |   |                                    |                                    |  |
| Israel Office  | 3  | 58,000  | 39,000                             | 97,000                             | 3  |
| "Operation Israel"                                   | 6  | 29,000  | --                                 | 40,000                             | 4  |
| Temporary Staff & Overtime                           | 22   | 255,000   | 200,000                            | 225,000                            | 22   |
| <b>TOTAL</b>   | <b>210</b>                                       | <b>\$2,882,500</b>                              | <b>\$2,668,000</b>                 | <b>\$2,994,000</b>                 | <b>202</b>   |



PROPOSED BUDGET - 1972

COMPARISON - 1971 EXPENSES

|                | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|----------------|------------------------|--|------------------------|
| Regular        | \$5,428,000            | \$5,890,000                                  | \$5,729,000            |
| Emergency Fund | 2,086,500              | 2,831,000                                    | 2,741,000              |

We are herewith submitting to the Budget and Finance Committee of the United Jewish Appeal, Inc. a consolidated budget for the 1972 Regular Campaign and the 1972 Emergency Fund Campaign.

The 1971 Regular and Emergency Campaigns produced a total pledge value of \$260,000,000 which was the highest pledge value produced in the history of the United Jewish Appeal. In order to raise \$260,000,000 it was necessary to increase staff, bring more speakers from overseas than ever before and utilize larger numbers of volunteer leadership than heretofore.

In addition, we enlarged the concept of the Prime Minister's Mission and initiated new programs such as Operation Breakthrough. Results of solicitation for the calendar year 1971 emanating from Operation Breakthrough were as follows:

|   | <u># of Gifts</u> | <u>Pledges</u>     | <u>Previous Gifts from<br/>Same Contributors</u> |
|---|-------------------|--------------------|--|
| From those who have<br>previously contributed<br>to UJA     | 95                | \$7,459,700        | \$2,506,075                                      |
| From those who have not<br>previously contributed<br>to UJA | <u>13</u>         | <u>457,827</u>     | <u>None</u>                                      |
| Total -----   | <u>108</u>        | <u>\$7,917,527</u> | <u>\$2,506,075</u>                               |

As a result of the 1971 achievement, this program will be expanded and accelerated in 1972.

Furthermore, the Prime Minister's Mission concept was enlarged again and entirely new plans were developed for 1972 such as Operation Upgrade, Closed Circuit Radio Network, Filmic Essays, Resident Solicitors and the use of Russian immigrants in Operation Freedom.

These new ideas are essential if the UJA 1972 Campaign is to meet the cost of UJA-supported humanitarian programs in 1972, which call for \$450,000,000 from the combined Regular and Emergency Fund Campaigns.

Although we have given due consideration in the 1972 budget to the increased activity required in working towards a goal of \$450,000,000, we believe that due to changed conditions and operations we can conduct the Campaign in 1972 at a lower expenditure than we experienced in 1971, despite the fact that we will be creating several new programs in 1972.

The following is a description of the departments of the United Jewish Appeal, their activities, expenditures for 1971 compared to the 1971 budget, plus the budgetary proposal for 1972.



FIELD DEPARTMENT

|                | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|----------------|------------------------|--|------------------------|
| Regular        | \$1,690,000            | \$1,801,500                                  | \$1,800,000            |
| Emergency Fund | 90,000                 | 175,000                                      | 206,000                |

The composition of the Field Department as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|                                    | <u>As of<br/>12/31/70</u> | <u>Staff<br/>Changes<br/>in 1971</u> | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|------------------------------------|---------------------------|--------------------------------------|---------------------------|----------------------------|
| Field Representatives              | 40                        | +4                                   | 44                        | 41                         |
| <u>Executives:</u>                 |                           |                                      |                           |                            |
| Campaign Director                  | 1                         |                                      | 1                         | 1                          |
| Associate Director                 | 2                         | +1                                   | 3                         | 3 (a)                      |
| Assistant Campaign Directors       | 8                         |                                      | 8                         | 8                          |
| Special Community Assignments      |                           | +2                                   | 2                         | 2 (b)                      |
| Cash Collections Director          | 1                         |                                      | 1                         | 1                          |
| Overseas Missions Director         | 1                         | -1                                   |                           | 0                          |
| Executive Assistant                | 1                         |                                      | 1                         | 0 (c)                      |
| Assistant to West Coast Director   |                           |                                      |                           | 1 (c)                      |
| Director of Labor Council          | 1                         |                                      | 1                         | 0 (d)                      |
| Total Executives -----             | 15                        | +2                                   | 17                        | 16                         |
| Office Personnel--National Office  | 12                        |                                      | 12                        | 12                         |
| Office Personnel--Regional Offices | 4                         |                                      | 4                         | 4                          |
| TOTAL -----                        | 71                        | +6                                   | 77                        | 73                         |

- (a) One Associate Director is in charge of the UJA activities on the West Coast.
- (b) Two Field Department Executives were assigned communities for special fund-raising efforts.
- (c) In 1972, Executive Assistant to the Campaign Director will be Assistant to the West Coast Director.
- (d) As of July 1, 1972, the Director of the Labor Council will be retiring from UJA. He will not be replaced.

Because of intensified fund-raising activities in 1971, it was necessary to increase the field staff, mainly in terms of additional field representatives. The added staff were assigned primarily to areas of large potential gains to UJA in expanding communities in California, Florida and New Jersey. We have been fortunate in bringing in a number of excellent young men to the field staff, of which two are in major communities for on-the-spot training. It is our hope in 1972 to reduce the overall field staff by replacing older men with younger personnel who can effectively carry larger assignments.

Furthermore, based on the experience of 1971, the Field Department intends to review its structure in order to further streamline the operation.

The 1972 payroll item includes union increments granted to field representatives for the second year of the 1971-1972 contract.

Per Diem and Hotels:

Since 1968 the per diem allowance paid to men in the field had been \$11.00 for food, tips, porters, laundry, etc. In view of increased living costs, the field staff was granted an increase to \$12.00 in 1971.

Travel:

Our field representatives' travel is controlled by an itinerary submitted by each man one week in advance, indicating his planned movements throughout his area. The Assistant Campaign Director is responsible for supervision of this itinerary, both as to movement and as to Campaign effectiveness.

The cost of automobiles and depreciation, gas, oil, air travel, home trips, and any other movements are charged to the travel item. Included in the travel item are expenses for the Executive Staff at such times as they travel on Campaign assignments. Therefore, the Field Department budget includes the travel of every person on the staff for Campaign commitments and is not solely restricted to the personnel of the Field Department.

The field representatives have the option of taking either fourteen paid trips home per year at intervals as stated in the contract, or week-end trips home at a maximum cost to the UJA of \$75.00 per trip, in which event UJA saves hotel charges and per diem costs.

The UJA, as of December 31, 1971, owned a fleet of 48 automobiles. Provision for depreciation of these automobiles is charged to travel expense.

Except for per diem, hotels and a portion of the miscellaneous expenses, most of the expenses incurred by the field representatives and Assistant Campaign Directors of the Field Department are through the use of credit cards. Each man, including Executives, is supplied with air travel, telephone credit, gasoline and oil credit cards. This makes control and supervision of expenses more effective.

Although all Field Department personnel, including new staff members, are charged to the Regular Campaign, it was felt that it would be equitable to allocate a portion of staff travel to the Emergency Fund. Basically, "Emergency Fund Staff Travel" includes travel expenses incurred by additional Field Staff required because of the Emergency Fund.

Telephone and Miscellaneous:

The major portion of this item represents charges for long distance telephone calls made for Campaign purposes by field representatives, Assistant Campaign Directors, Executives, etc. Also included are various miscellaneous items of the travelling staff such as taxicabs, local telephone, telegrams, postage, cartage, minor automobile repairs, car rentals, airport buses, equipment and typewriter repairs, etc.

Regional Offices:

In 1971 there were five regional offices: Los Angeles, Pittsburgh, Teaneck, N. J., Spring Valley, N. Y., and Norfolk, Va.

The Los Angeles office services the Western Regional area. It is staffed by two clerical workers and serves as the base of operations for one Associate Campaign Director and six field representatives. As of April 1, 1972 the Los Angeles office will be reinforced by an Assistant to the West Coast Director.

The Pittsburgh office is for the Tri-State region of parts of Western Pennsylvania, West Virginia and Ohio. This office is staffed by one clerical worker and serves as the base of operations for one Assistant Campaign Director and three field representatives.

The Teaneck, N. J. office services the Bergen County area. This is a small office with one clerical worker which one member of the Field Staff uses as his base of operations for the heavy concentration of communities in the Bergen County area.

We also have a small office in Spring Valley, N. Y. to service the growing Rockland County area. In addition, we have desk space at the Norfolk Federation to serve as a base of operations for the Virginia and Carolinas area.

SPEAKERS BUREAU

|                | <u>1971</u><br><u>BUDGET</u> | <u>TOTAL</u><br><u>ESTIMATED</u><br><u>1971 EXPENSES</u> | <u>1972</u><br><u>BUDGET</u> |
|----------------|------------------------------|--|------------------------------|
| Regular        | \$395,000                    | \$405,000  | \$400,000                    |
| Emergency Fund | 350,000                      | 524,000  | 403,000                      |

The composition of the Speakers Bureau as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|                              | <u>As of</u><br><u>12/31/70</u> | <u>Staff</u><br><u>Changes</u><br><u>in 1971</u> | <u>As of</u><br><u>12/31/71</u> | <u>1972</u><br><u>Projection</u> |
|------------------------------|---------------------------------|--|---------------------------------|----------------------------------|
| Director                     | 1                               |  | 1                               | 1                                |
| Speakers Aide                | 0                               | +1   | 1                               | 1                                |
| Booker                       | 1                               |  | 1                               | 1                                |
| Traffic Department Personnel | 1                               |  | 1                               | 1                                |
| Clerical Personnel           | 3                               | +1   | 4                               | 4                                |
| <b>Total</b>                 | <b>6</b>                        | <b>+2</b>  | <b>8</b>                        | <b>8</b>                         |

Due to increase in meetings and bookings, we had to increase staff in this department. However, one of the additional staff members is hired only for the heaviest period.

The following schedule illustrates the extent of activity in this department:

MEETINGS AND SPEAKERS  
1970 & 1971 CAMPAIGNS

|           | <u>1970 Campaign</u> |                 | <u>1971 Campaign</u> |                 |     |     |
|-----------|----------------------|-----------------|----------------------|-----------------|-----|-----|
|           | <u>Meetings</u>      | <u>Speakers</u> | <u>Meetings</u>      | <u>Speakers</u> |     |     |
| September | 1969 {               | 49              | 50                   | 1970 {          | 144 | 241 |
| October   |                      | 102             | 106                  |                 | 170 | 202 |
| November  |                      | 130             | 143                  |                 | 205 | 198 |
| December  |                      | 85              | 130                  |                 | 130 | 142 |
| January   | 1970 {               | 159             | 187                  | 1971 {          | 285 | 301 |
| February  |                      | 291             | 270                  |                 | 447 | 454 |
| March     |                      | 503             | 469                  |                 | 670 | 688 |
| April     |                      | 318             | 308                  |                 | 342 | 330 |
| May       |                      | 253             | 255                  |                 | 203 | 214 |
| June      |                      | 150             | 161                  |                 | 104 | 106 |
| July      |                      | 19              | 20                   |                 | 15  | 16  |
| August    |                      | 14              | 14                   |                 | 20  | 20  |
|           | <b>2,073</b>         | <b>2,113</b>    | <b>2,735</b>         | <b>2,912</b>    |     |     |

For the 1970 Campaign there were 2,073 meetings and 2,113 speakers used. For the 1971 Campaign, there were 2,735 meetings and 2,912 speakers used. Therefore, in 1971, 622 more meetings were held and 839 more speakers were used. In preparing the 1971 budget we underestimated the intensity of the 1971 Campaign as the increase in meetings forced the overage in the Speakers budget.

Speakers Fees, Expenses, Travel and Volunteer Speakers Expenses:

There are three categories of speakers obtained for the many meetings throughout the country:

(1) Paid Speakers -- UJA uses a group of paid speakers whose fees normally range from \$75.00 to \$300.00 per speech. On rare occasions, when Campaign needs warrant it, UJA provides speakers commanding still higher fees. As a rule, UJA pays up to \$100.00 per speech, while the community pays the balance of the fee. Expenses and travel for these fee speakers are obviously inter-related to the number of fee speakers used. The major fee speakers used during 1971 were: Martin Agronsky, Jeanne Daman, John S. Grauel, Yehuda Hellman, Hy Kalus, Ralph J. Kaplan, Gerda Klein, Zvi Kolitz, William Korey, Henry Levy, Ariel Plotkin, David Schoenbrun, Howard Sachar, Carl Voss.

(2) Speakers from Overseas -- Arrangements are made to bring over speakers from Israel and other parts of the world so that the needs of the United Israel Appeal and the Joint Distribution Committee can be told more effectively at meetings. These overseas speakers do not receive fees but incur expenses for travel, per diem, hotels, etc., which are charged to Volunteer Speakers expenses.

Many more overseas speakers were brought over for the 1971 Campaign than for 1970. Please refer to the following analysis listing overseas speakers brought over for the 1970 Campaign and those brought over for the 1971 Campaign.

(See next page)

UJA SPEAKERS FROM OVERSEAS  
1970 & 1971 CAMPAIGNS

|                          | <u>1970 Campaign</u> | <u>1971 Campaign</u> |
|--------------------------|----------------------|----------------------|
| Benad Avital             | 3/1 - 4/12           |                      |
| Gershon Avner            | 3/8 - 3/26           | 11/29 - 12/11/70     |
| Menachem Beigin          | 3/22 - 3/25          |                      |
| Abbie Ben Ari            | 3/15 - 3/28          |                      |
| Rachel Ben Yochanan      | 3/30 - 4/15          |                      |
| Avraham Biran            | 3/13 - 4/12          | 1/20 - 3/3/71        |
| Otto Cohen               | 2/26 - 3/28          |                      |
| Mrs. Joan Comay          | 1/7 - 1/29           |                      |
| Ambassador Michael Comay | 1/7 - 1/27           |                      |
| Ruth Dayan               | 2/17 - 3/16          | 2/20 - 3/17/71       |
| Simcha Dinitz            | 3/29 - 4/9           |                      |
| Leon Dultzin             | 3/17 - 3/18          | 9/10 - 9/21/70       |
| Miriam Eshkol            | 3/19 - 4/7           | 3/11 - 3/30/71       |
| General Y. Gavish        | 2/17 - 3/16          |                      |
| Lou Horowitz             | 3/25 - 4/10          |                      |
| Aharon Kidan             | 3/23 - 4/16          | 11/17 - 11/29/70     |
| General Asher Levy       |                      | 11/3 - 11/21/70      |
|                          |                      | 2/8 - 2/18/71        |
| Abe Loskove              | 3/13 - 4/14          |                      |
| Major Yardena Oshri      | 4/30 - 5/28          |                      |
| General Moshe Peled      | 1/6 - 1/26           |                      |
| Evelyn Peters            | 3/1 - 3/12           |                      |
| Major Yehuda Porat       | 3/14 - 3/15          |                      |
| Gideon Rafael            | 4/6 - 4/8            |                      |
| Moshe Rivlin             | 4/6 - 4/13           |                      |
| General Shaul Rosolio    | 3/1 - 3/31           | 9/14 - 9/27/70       |
|                          |                      | 3/1 - 3/17/71        |
| Harold Trobe             | 2/16 - 3/10          |                      |
| General A. Yariv         | 11/17 - 11/30/69     |                      |
| Joseph Almogi            |                      | 9/14 - 9/28/70       |
| Michael Arnon            |                      | 9/20 - 9/28/70       |
| Asher Ben-Natan          |                      | 9/8 - 9/14/70        |
| Zvi Tzur                 |                      | 9/21 - 9/28/70       |
| Abba Eban                |                      | 9/23 /70             |
|                          |                      | 3/17 - 3/18/71       |
| Yona Efrat               |                      | 9/14 - 9/22/70       |
| Shmuel Gorodish          |                      | 9/14 - 9/28/70       |
| Avraham Harman           |                      | 9/16/70              |
| Mordechai Hod            |                      | 9/20 - 9/27/70       |
| Benjamin Peled           |                      | 9/8 - 9/15/70        |
| Louis Pincus             |                      | 9/14 - 9/22/70       |
|                          |                      | 12/7 - 12/15/70      |
| Aharon Yariv             |                      | 9/8 - 9/16/70        |
|                          |                      | 12/8 - 12/13/70      |



UJA SPEAKERS FROM OVERSEAS  
1970 & 1971 CAMPAIGNS (continued)

| <u>1970 Campaign</u>  | <u>1971 Campaign</u> |
|-----------------------|----------------------|
| General Adan (Bren)   | 11/17 - 11/24/70     |
| Col Lev Arlozaroff    | 12/6 - 12/17/70      |
| Col. Eli Bar-Lev      | 2/3 - 2/26/71        |
| Paula Borenstein      | 3/1 - 3/3/71         |
| Dr. Bernard Cherrick  | 1/19 - 2/21/71       |
| Col. Eliezer Cohen    | 3/16 - 3/27/71       |
| Gen. David Elazar     | 10/12 - 10/20/70     |
| Lt. Col. Galon        | 3/1 - 3/16/71        |
| Gen. Mata Gur         | 1/5 - 1/13/71        |
| Gen. Amos Horev       | 3/15 - 3/28/71       |
| Col. David Ivry       | 12/6 - 12/17/70      |
| Dr. Akiva Kohane      | 3/18 - 3/30/71       |
| Teddy Kollek          | 3/23 - 3/24/71       |
| Maj. Shula Legum      | 4/18 - 5/5/71        |
| Gen. Albert Mendler   | 1/6 - 1/17/71        |
| Col. Nevo             | 2/2 - 2/16/71        |
| Czech Noy Group       | 2/1 - 2/12/71        |
| Gen. David Ofer       | 3/1 - 4/5/71         |
| Moshe Pearlman        | 3/17 - 3/30/71       |
| Shimon Peres          | 1/6 - 1/11/71        |
| Reuven Rogofsky       | 2/14 - 3/20/71       |
| Capt. Giora Rom       | 2/15 - 2/25/71       |
| Pinhas Sapir          | 2/5 - 2/9/71         |
| Col. Emanuel Shakked  | 1/21 - 2/4/71        |
| Capt. Dov Shaphir     | 11/5 - 11/22/70      |
| Col. Nathan Sharony   | 11/2 - 11/19/70      |
| Lt. Col. Aaron Shavit | 3/10 - 3/29/71       |
| David Shenabi         | 10/13/70             |
| Capt. Igal Shohat     | 4/19 - 5/2/71        |
| Lt. Col. Uri Talmor   | 1/13 - 1/31/71       |
| Col. Devorah Tomer    | 3/2 - 3/11/71        |



Also included in 1971 Volunteer Speakers Expenses and in the 1972 budget is an amount of \$31,848 covering Israeli speakers used in the many meetings covered by the UJA of Greater New York.

Because of their effectiveness at fund-raising meetings, in 1972 we are continuing our policy of bringing overseas personalities to the United States. For the 1972 Campaign we have thus far made plans to use the following personalities from overseas: Prime Minister Golda Meir, General Moshe Dayan, Ambassador Abba Eban, Louis Pincus, Leon Dulzin, Pinhas Sapir, Major Hanon Alon, Wellesley Aron, Mordechai Avnon, Joseph Almogi, General Haim Bar-Lev, Abbie Ben-Ari, Dr. Avraham Biran, Paula Borenstein, Bernard Cherrick, Ethel Cohen, Ruth Dafni, Claire Davidson, Ruth Dayan, Simcha Dinitz, Yehuda Dominitz, Miriam Eshkol, Col. Jacob Even, Ted Feder, Mr. and Mrs. Arie Freidin, Rita Gluzman, General Mata Gur, Zena Harman, General Amos Horev, Aaharon Kidan, Julia Lieberman, Col. Gideon Machanayim, General Moshe Meron, Yaacov Morris, Capt. David Nair, Evelyn Peters, Harry Rosen, Shula Prihar, Yehuda Prihar, Moshe Rivlin, General Shaul Rosolio, Capt. Dov Shaphir, Col. Nathan Sharony, Max Varon, Julia Weiner, General Aharon Yariv, Victor Yoram, Col. Moshe Yotvat, Vladimir Zaretski.

The following Israelis have been used in communities in a new program initiated for the 1972 Campaign which we call "Resident Solicitors": Avraham Biran, Yehuda Prihar, Dov Shaphir, Wellesley Aron, Reuven Dafni, Moshe Avnon, Max Varon, Gen. N. Sharony, Yaacov Morris, Aaharon Kidan, Col. Yotvat. These solicitors remain in communities from two weeks to a month. Their main purpose is to work with communities on direct solicitations for the purpose of upgrading gifts.

Participation of Russian Immigrants in the UJA Campaign:

Rita Gluzman, Julia Wiener, Mr. and Mrs. Arie Freidin, Vladimir Zaretski, Victor Yoram, Julia Lieberman -- all of whom left the Soviet Union recently, have spoken on behalf of the UJA 1972 Campaign. Moshe Rivlin, Director General of the Jewish Agency, is personally selecting suitable speakers among newly arriving Jewish immigrants from the Soviet Union who will be coming to the United States and will speak and solicit on behalf of UJA, since this is one of the major topics of fund-raising for the 1972 Campaign.

(3) Lay Speakers -- In addition to speakers from overseas, UJA utilizes lay leadership for meetings throughout the country, wherever this is possible and effective. Travel, hotel and other expenses incurred by lay leaders in connection with speaking engagements are charged to the Volunteer Speakers Expenses account. 170 communities were visited by 250 lay leaders during 1971. Lay leaders were used as follows:

|                           | # of<br>Lay Leaders |
|---------------------------|---------------------|
| Operation Israel Meetings | 20                  |
| Quota Setting Meetings    | 12                  |
| Operation Upgrade         | 12                  |
| Direct Fund-Raising       | 206                 |
| Total -----               | 250                 |
|                           | =====               |

Quota meetings were set up throughout the country in order to convey the challenge UJA faces in 1972 and to establish dimensions of giving. In addition, the quota meetings served as a device to solicit top gifts.

It is the intention of the present leadership of UJA to involve the maximum number of lay leaders in the 1972 Campaign.

Miscellaneous:

The following sundry expenditures incurred by the Speakers Bureau fall into this category: printing of material, subscriptions, photos, tapings and staff travel.



PUBLIC RELATIONS DEPARTMENT

|                | 1971<br>BUDGET | TOTAL<br>ESTIMATED<br>1971 EXPENSES | 1972<br>BUDGET |
|----------------|----------------|-------------------------------------|----------------|
| Regular        | \$592,500      | \$654,500                           | \$650,000      |
| Emergency Fund | 512,500        | 725,000                             | 678,000        |

The composition of the Public Relations Department as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|  | As of<br>12/31/70 | Staff<br>Changes<br>in 1971 | As of<br>12/31/71 | 1972<br>Projection |
|--|-------------------|-----------------------------|-------------------|--------------------|
| Director of Public Relations             | 1                 |                             | 1                 | 1                  |
| Assistant Directors of Public Relations  | 1                 | +1                          | 2                 | 2                  |
| Director of Public Affairs               | 1                 |                             | 1                 | 1                  |
| Public Relations Director for West Coast | 1                 | -1                          |                   |                    |
| Writers                                  | 6                 |                             | 6                 | 6                  |
| Production Man                           | 1                 |                             | 1                 | 1                  |
| Artist                                   | 1                 |                             | 1                 | 1                  |
| Publicist in Israel                      | 1                 |                             | 1                 | 1                  |
| Secretarial Staff                        | 7                 |                             | 7                 | 7                  |
| Total -----                              | 20                |                             | 20                | 20                 |

In 1971 the Public Relations Department created, produced and distributed a large volume of advertising, Campaign materials, literature, and audio-visual materials. The main function of the department is to provide the Federated and non-Federated communities with all materials necessary to conduct an effective local Campaign for the United Jewish Appeal. This involves not only producing the materials themselves but providing instructions for the materials and, in many instances, having members of our Public Relations Department visit and counsel with local executive and public relations directors on implementation of effective public relations programs.

There are many other functions performed by the Public Relations Department of a more general nature, such as mailings of invitations to conferences, providing lay leadership with speeches and catering to the everyday needs of the lay leadership and the management of the UJA. We are involved daily with not only the public relations activities of the Federations, but with the internal divisions of the UJA. This means that each division has a member of the public relations staff assigned to it, to work with them on a continuing basis.

Furthermore, there are many activities difficult to categorize, which are a public relations function. It must be pointed out that the present Public Relations Department is involved in activities which are only in the broadest

sense public relations. Its activities have expanded beyond what is strictly a public relations function and its scope is broader than it has ever been before.

The increased performance of the Public Relations Department is reflected in the increased usage of materials and acceptance of our materials by the local communities.

The following is a breakdown by category of the various budgetary items and what they include:

Literature and Printing:

This category includes the full extent of the cost of printing all of the community materials which includes local adaptation. These include advertising, stuffers, direct mail pieces, manuals, posters, etc.; all of the materials which are produced not only for the Campaign but on a year-round basis for the specific usage of communities in the Campaign, as well as pieces used on a national basis. Also included are special newsletters, which do not pertain to any division, special mailings, etc. All of this is within the bailiwick of the public relations program.

Items produced for the various divisions are charged to their respective departments.

Mail Service - Postage:

This category reflects all the mailings of material produced in the Public Relations Department.

Mail Service - Labor:

This item represents amounts paid to outside mail services for work performed in the mailing of items produced by the department.

Photographs:

The department has established a photo library and maintains this library, and makes it available for usage by the communities for use in their local publications or newspapers, etc. The communities request pictures frequently from us and we must reproduce the photographs and provide them with it quickly. There is a large demand for these photographs, which also include photos of individuals for use in press kits or press releases, in distribution, etc.

Mats, Artwork and Typography:

In somewhat the same manner as photographs, mats and artwork are made available to communities for their use.

Travel:

The department has an extensive community consulting program: "Operation Outreach," which involves in-depth analyses of major community requirements and direct consulting with them for proper implementation of a Public Relations program. The Public Relations Department personnel travel frequently to these communities to meet with the Campaign and Public Relations Directors to give them guidance. It should also be pointed out that the travel in 1971 was extensive because each Mission was accompanied by one or, in some cases, two members of the Public Relations staff. This is now being handled almost completely by the Public Relations staff and firm in Israel, resulting in a substantial savings in this area.

Newspapers and Subscriptions:

This item includes the daily newspapers, subscriptions to various magazines, Anglo-Jewish press, and special issues that we may purchase for specific needs.

Motion Pictures, TV Spots and Transcriptions:

This is an area which has changed considerably. TV spots and transcriptions were produced as standard items. Expenditures in this category included \$50,000 for a film produced on behalf of the Students Coordinating Committee for the Israel Emergency Fund. For the 1972 Campaign four filmic essays were produced and the 1972 budget includes the cost for their production. Also included are reproductions of films, prints, slide shows and a cassette program. The audio-visual program has been substantially increased in scope and probably will continue to expand in the future.

Videocorder:

There are presently 45 communities in UJA's videocorder network. Thirty of these own machines. When video tapes are prepared by UJA, they use the equipment. This area is being reviewed by UJA for 1972.

Advertising Agency Retainer:

This item represents the annual retainer paid to Allerton, Berman and Dean. This covers specific Campaign items and creative time involved in helping to create the materials for our Campaign.

The purpose of the Agency is to help the UJA Public Relations staff in preparation of the extensive materials for the Campaign. This includes not only advertising but stuffers, brochures, and printed materials. In addition to this, this year they were involved in the production of the radio and television spots. They are used on a continuing basis.

Advertising:

The advertising budget covers the advertising programs of communities around the country. Many of these communities do not have the funds to do a complete program or sufficient program to make any impact so they are subsidized both for the Anglo-Jewish press and the general press.

Clippings:

The UJA subscribes to a national clipping service which sends us all articles of interest to the UJA. There is another clipping service which just clips items from the Anglo-Jewish press. Those materials are used to keep track of what is happening in the Jewish communities in the country as well as to check on material originated by the UJA Public Relations Department.

Public Relations Retainer in Israel:

We have retained Israel Communications Ltd. to represent the UJA in its public relations work performed in Israel. The firm staffs all Missions to Israel eliminating the necessity for New York staff members to accompany Missions. Furthermore, they are used for public relations work in the Hebrew press and in general public relations activities which without their help could not be coordinated from New York. They have become an essential part of our overall program and the retainer covers our association.

Publicity Expenses in Israel:

This item includes travel, telephone, secretarial and other expenses incurred by our Public Relations staff man in Israel.

Pins, Banners, Awards, Miscellaneous:

This is a general category which includes as stated, pins, banners, and awards. It also includes such sundry items as public relations meetings, film storage costs, artists materials, special messenger service, telegrams, cables, and petty cash.

Jewish Telegraphic Agency:

In 1972 we are projecting expenses for the Jewish Telegraphic Agency amounting to \$25,000. This is a form of support of the JTA.

Multi Media Module:

This is the cost resulting from the mobile exhibit which was conceived by the Public Relations Department in 1971. This portrays the work and scope of UJA through both graphics and two slide shows. The purpose of the exhibit is to

dramatically display the importance of the Campaign in the local communities. Five multi media modules were built and exhibited in the following 23 cities during 1971: New York City, Chicago, Cleveland, Newark, Philadelphia, St. Louis, Washington, New Brunswick, Scranton, Atlanta, Boston, Cincinnati, Detroit, Minneapolis, Pittsburgh, Atlantic City, Hollywood, New Orleans, Stamford, Rochester, Providence, Des Moines, and Grossinger's. More than thirty cities will be covered in 1972. In addition to the production costs of the actual exhibits themselves, the account includes costs of transporting the modules, assembling and disassembling them as they move from one community to another. This cost should be substantially lower than in 1971 because the five modules this year are located strategically to cover the five basic regions in the United States for easy transportation covering less distances.

It should be pointed out here that the Public Relations Department activities in 1972 will no doubt expand beyond its activities in 1971. This means that in certain areas such as audio-visual materials, costs will be greater and in other areas there will be cutbacks.





WOMEN'S DIVISION

|         | <u>1971</u><br><u>BUDGET</u> | <u>TOTAL</u><br><u>ESTIMATED</u><br><u>1971 EXPENSES</u> | <u>1972</u><br><u>BUDGET</u> |
|---------|------------------------------|--|------------------------------|
| Regular | \$108,000                    | \$114,000  | \$121,000                    |

The composition of the Women's Division as of December 31, 1971, and a projection for 1972 is as follows:

|                    | <u>As of</u><br><u>12/31/71</u> | <u>1972</u><br><u>Projection</u> |
|--------------------|---------------------------------|----------------------------------|
| Director           | 1                               | 1                                |
| Assistant Director | 1                               | 1                                |
| Secretaries        | 2                               | 2                                |
| Total              | <u>4</u>                        | <u>4</u>                         |

The Women's Division carries on an intensive Campaign among women throughout the country. In 1971 \$37,000,000 came directly from women over and above their husband's gift. There are 275 Women's Divisions in the country. The Director and Assistant Director of the Women's Division work through a formal Women's Division Regional structure. Through this Regional structure, women throughout the country are given a sense of greater involvement with the efforts of UJA.

The expenses incurred by this Department are as follows: travel of the professional Director, Assistant Director, and the Women's Division Chairman to various Women's Division meetings; printing of material; mail service; postage; mats; artwork; photos; pins and badges; luncheons and dinners.

During 1971, the Women's Division sponsored an Operation Israel trip for women to Israel. 106 women participated in this Mission. A similar trip is planned for 1972. The cost of this trip is charged to the Operation Israel account.

In addition, a Women's Division Chairmen's Mission, led by Elaine Siris, 1972 Women's Division Chairman, was sent to Israel in October 1971. Fourteen communities were represented in the Women's Division Chairmen's Mission.

YOUNG LEADERSHIP DEPARTMENT

|         | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|---------|------------------------|--|------------------------|
| Regular | \$107,000              | \$111,000                                    | \$110,000              |

The composition of the Young Leadership Department as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|                          | <u>As of<br/>12/31/70</u> | <u>Staff<br/>Changes<br/>in 1971</u> | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|--------------------------|---------------------------|--------------------------------------|---------------------------|----------------------------|
| Director                 | 1                         |                                      | 1                         | 1                          |
| Assistant Director       | 1                         | -1                                   |                           |                            |
| Administrative Assistant |                           | +1                                   | 1                         | 1                          |
| Secretaries              | 2                         |                                      | 2                         | 2                          |
| Total                    | 4                         |                                      | 4                         | 4                          |

The purpose of this Department is the development of UJA leaders for the years ahead. UJA has successfully recruited individuals with leadership potential to speak at fund-raising meetings and solicit contributions throughout the country. Many members of the Young Leadership Cabinet have already assumed posts of leadership in their local communities and many are now UJA leaders on the national level. Twenty-three former members of the Young Leadership Cabinet are now members of the UJA National Cabinet.

The Young Leadership Cabinet includes 32 local Campaign Chairmen or Past Chairmen, 69 members of local Welfare Boards, 16 Trade Division Chairmen, 15 members of Federation Allocation Committees, 3 Big Gifts Chairmen, 1 Welfare Fund Treasurer, 1 Past President of Welfare Fund, and 1 Public Relations Campaign Chairman. Young Leadership Cabinet members are also given assignments for Cash Collections, Operation Israel and Operation Upgrade.

During 1971, three Young Leadership Missions were held. There were 108 participants on the March Mission, 50 on the July Mission, and 95 on the November Mission. Three Young Leadership Missions are thus far planned for 1972. The cost of these Missions is charged to the Overseas Delegations Department.

In December 1971, a National Young Leadership Conference was held as part of the UJA National Annual Conference Program. In addition, for 1971, two Young Leadership Regional Conferences were held -- one in Chicago, Illinois, and the other in Atlanta, Georgia. For 1972, Young Leadership Regional Conferences have thus far been planned for New England, in Boston, and for the Southwest, in Texas.

Expenditures incurred by this Department fall into the following categories: books and periodicals; printing of material; mail service; postage; travel of the Director; and meeting expenses. Also included are expenditures in connection with the "Young Leadership Cabinet Retreat" held in May at Harrison House, Glen Cove, N. Y. A similar retreat will be held in May, 1972.

ISRAEL OFFICE

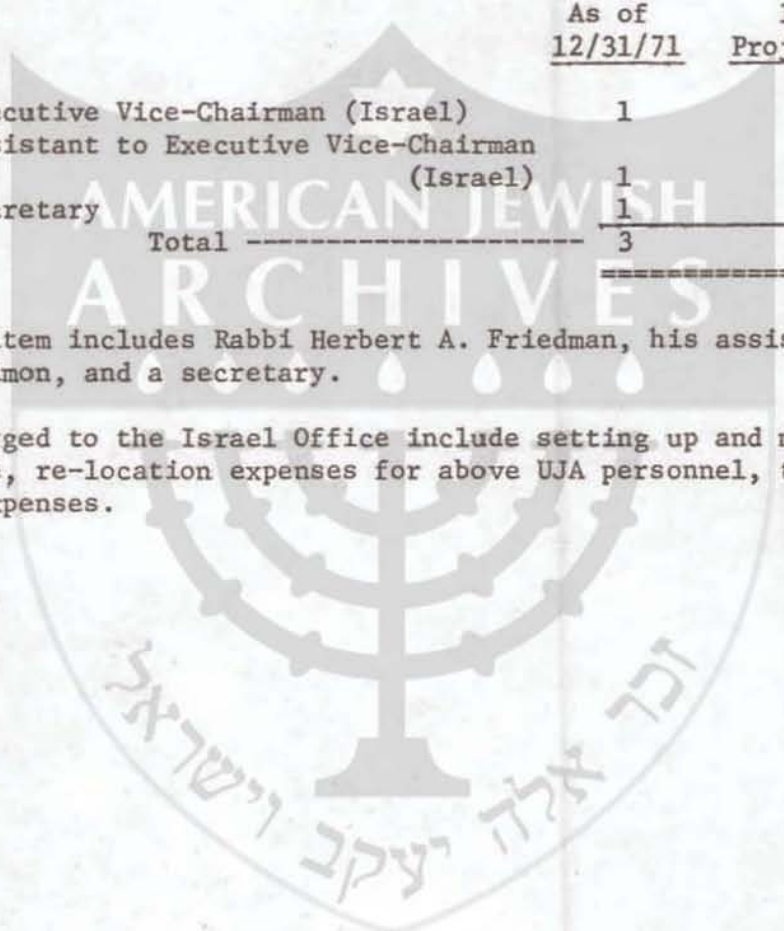
|                | <u>1971</u><br><u>BUDGET</u> | <u>TOTAL</u><br><u>ESTIMATED</u><br><u>1971 EXPENSES</u> | <u>1972</u><br><u>BUDGET</u> |
|----------------|------------------------------|--|------------------------------|
| Emergency Fund | \$43,000                     | \$138,000  | \$152,000                    |

The composition of the Israel Office as of December 31, 1971, and a projection for 1972 is as follows:

|  | <u>As of</u><br><u>12/31/71</u> | <u>1972</u><br><u>Projection</u> |
|--|---------------------------------|----------------------------------|
| Executive Vice-Chairman (Israel)                 | 1                               | 1                                |
| Assistant to Executive Vice-Chairman<br>(Israel) | 1                               | 1                                |
| Secretary  | 1                               | 1                                |
| Total -----                                      | <u>3</u>                        | <u>3</u>                         |

The payroll item includes Rabbi Herbert A. Friedman, his assistant, Rabbi Matthew H. Simon, and a secretary.

Expenses charged to the Israel Office include setting up and maintaining the Israel Office, re-location expenses for above UJA personnel, travel, telephone and automobile expenses.



OVERSEAS EXPENSES

|           | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|-----------|------------------------|--|------------------------|
| Regular   | \$115,000              | \$115,000                                    | \$115,000              |
| Emergency | 415,000                | 542,000                                      | 607,000                |

The composition of the Overseas Department as of December 31, 1971, and a projection for 1972 is as follows:

|             | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|-------------|---------------------------|----------------------------|
| Promotional | 2                         |                            |
| Clerical    | 4                         | 4                          |
| Total       | 6                         | 4                          |

The 1972 budgetary request is \$115,000 for the Regular Campaign and \$607,000 for the Emergency Fund. The increase in this budget is due to the increased costs of the special Prime Minister's Mission which was held in August of 1971 to launch the 1972 Campaign.

The breakdown of Overseas Expenses for 1972 is as follows:

|  | <u>Regular<br/>Campaign</u> | <u>Emergency<br/>Fund</u> |
|--|-----------------------------|---------------------------|
| October Study Mission  | \$ 45,000                   | \$ 60,000                 |
| Young Leadership Missions  | 15,000                      | --                        |
| University Study Missions  | 25,000                      | --                        |
| Officers, Executives & Field Staff   | 30,000                      | 55,000                    |
| Public Relations Directors Mission   | --                          | 10,000                    |
| Operation Joshua - One-day tours of Israel for students arranged under auspices of UJA. Over 2,100 participants during 8-week period in Summer, 1971 | --                          | 35,000                    |
| Sub-Total  | \$115,000                   | \$160,000                 |

Operation Israel:

The purpose of Operation Israel is to provide American Jews with the opportunity to make an intensive one-week survey of programs and conditions in Israel. During the Winter of 1970-1971 we were responsible for 10 plane-loads of Operation Israel participants to Israel. The value of Operation Israel was proven by the increased giving among participants at fund-raising sessions in Israel. The gifts made by participants of Operation Israel - 1971 flights were as follows:

|                      |             |
|----------------------|-------------|
| No. of Gifts - 1,081 |             |
| 1971                 | \$8,689,391 |
| Comparison 1970      | 5,402,245   |

|                           |    |         |
|---------------------------|----|---------|
| Operation Israel Payroll  | -- | 40,000  |
| Operation Israel Expenses | -- | 100,000 |

|  | <u>Regular<br/>Campaign</u> | <u>Emergency<br/>Fund</u> |
|--|-----------------------------|---------------------------|
| Prime Minister's Mission --  |                             |                           |
| Five-day trip (August 29 - September 2, 1971) arranged for the leadership of communities which in 1971 raised \$1,000,000 and more. Of the 230 Mission members, 31 were 1972 Campaign Chairmen, 154 were major givers, and 45 were Executive Directors. Mission participants met with Louis Pincus, Leon Dulzin, Abba Eban, Pinhas Sapir, Gen. Mordechai Hod, Gen. Aharon Yariv, Moshe Dayan and Prime Minister Golda Meir. The reaction of most of the participants indicated that this Mission was successful in providing the understanding and motivation for evoking appropriate responses in their communities. 111 gifts totalling \$14.1 million were announced for 1972, a 31.4% increase, compared to \$10.7 million from the same contributors in 1971. | \$                          | \$                        |
|  |                             | 272,000                   |

Newspapermen's Missions:

Newspapermen's Missions are conducted to assist key communities in arousing increased interest in supporting the Campaign. Leading newspapers in key communities, those that raise at least a half-million dollars, are invited by the local community to send a top editor or top reporter on such a Mission for a period of ten to twelve days. The Mission members are shown Israel in depth. They see problems of Israel's people and the humanitarian work made possible by UJA and generously report their findings in a series of articles. In 1971 we had four such Missions. In 1972 we are planning two Missions.

|  |                  |                  |
|--|------------------|------------------|
| Expenses incurred on the Newspapermen's Missions are subsidized by UJA | --               | 35,000           |
| <b>TOTAL</b>   | <b>\$115,000</b> | <b>\$607,000</b> |

RECAPITULATION OF 1972 OVERSEAS EXPENSE BUDGET

|                                      | <u>Regular<br/>Campaign</u> | <u>Emergency<br/>Fund</u> |
|--------------------------------------|-----------------------------|---------------------------|
| October Study Mission                | \$ 45,000                   | \$ 60,000                 |
| Young Leadership Missions            | 15,000                      | --                        |
| University Study Missions            | 25,000                      | --                        |
| Officers, Executives and Field Staff | 30,000                      | 55,000                    |
| Public Relations Directors Mission   | --                          | 10,000                    |
| Operation Joshua                     | --                          | 35,000                    |
| Operation Israel                     | --                          | 140,000                   |
| Prime Minister's Mission             | --                          | 272,000                   |
| Newspapermen's Missions              | --                          | 35,000                    |
| <b>TOTAL</b>                         | <b>\$115,000</b>            | <b>\$607,000</b>          |

UNIVERSITY PROGRAMS DEPARTMENT

|         | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|---------|------------------------|--|------------------------|
| Regular | \$98,000               | \$125,000                                    | \$125,000              |

The composition of the University Programs Department as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|  | <u>As of<br/>12/31/70</u> | <u>Staff<br/>Changes<br/>in 1971</u> | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|--|---------------------------|--------------------------------------|---------------------------|----------------------------|
| Director                                   | 1                         |                                      | 1                         | 1                          |
| Secretary                                  | 1                         |                                      | 1                         | 1                          |
| National Student Coordinating<br>Committee | 3                         | +3                                   | 6                         | 5                          |
| Total                                      | 5                         | +3                                   | 8                         | 7                          |

In the implementation of UJA's Campus Program for 1972, the Director of the University Programs Department works with the National Student Coordinating Committee, consisting of six students from various parts of the country. These students, who have taken leaves of absence, are employed on a full-time basis.

In 1971 the members of the Committee participated in the development of materials for the Campus Campaigns, including a manual, posters, position papers, buttons and various types of Campaign literature. In addition, they visited Campuses throughout the country, speaking at meetings, conducting training sessions and mobilizing support for Campus Campaigns. Another important task of the National Student Coordinating Committee was the recruitment for Student Missions.

An important program in the development of the future leadership for UJA and the American Jewish community has been the University Students Mission. During 1971, UJA conducted two such Missions - one in the Summer, and a Campus Leadership Mission held in December. Sixty-five students were on the Summer Mission and seventy-eight students were on the December Mission. Participants in the Missions are selected on the basis of potential for leadership on the Campus and in the community.

Another important aspect of the Student Program is Operation Joshua, which consisted of a series of day-long bus trips leaving from both Jerusalem and Tel Aviv. Operation Joshua was designed to reach the large number of American college students who come to Israel each Summer on their own with no program,

no planned itinerary and no vehicle for exposure to the problems and needs of Israel's people. The idea behind Operation Joshua was to expose the students to UJA-related programs by taking them to problem areas, absorption centers and border settlements. The itinerary is designed to maximize the student's encounter with problems that confront the people of Israel today.

Operation Joshua - 1971 reached 2,100 American college students who were given at least one full day's exposure to the work of UJA in Israel. Students who participate in Operation Joshua act as a nucleus in the formation of truly effective Campus Campaigns. Over 175 American Campuses and 50 Campuses outside the United States were reached as a result of last Summer's Operation Joshua program.



RABBINICAL ADVISORY COUNCIL

|         | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|---------|------------------------|--|------------------------|
| Regular | \$56,000               | \$85,000                                     | \$68,000               |

The composition of the Rabbinical Advisory Council as of December 31, 1971, and a projection for 1972 is as follows:

|                    | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|--------------------|---------------------------|----------------------------|
| Director           | 1                         | 1                          |
| Associate Director | 1                         | 0*                         |
| Secretary          | 1                         | 1                          |
| <b>Total</b>       | <u>3</u>                  | <u>2</u>                   |

\* The Associate Director will be leaving the service of the United Jewish Appeal on July 1, 1972.

The approximately 3,000 rabbis in the United States were viewed as potential resource for the United Jewish Appeal that had not been adequately exploited. The Rabbinical Advisory Council was created in order to establish lines of communication between the three major rabbinical bodies and us. Approximately twenty men from each of these national rabbis' groups are represented on our Rabbinical Advisory Council. In addition, the professionals who serve as executives of the major rabbinical bodies and of local boards of rabbis sit as ex officio members of the Rabbinical Advisory Council.

The ultimate goal of the work of the Rabbinical Advisory Council is to achieve the commitment of every rabbi in the United States to the principle that each synagogue member ought to be a contributor to the UJA Campaign. The major mechanism for achieving this result is the "100% Plan" which involves a resolution by the Board of Trustees of the synagogue relating synagogue affiliation to UJA giving, the establishment of a committee within the congregation to solicit any of its members who are non-contributors and to carry on an on-going program of education and motivation.

The Rabbinical Advisory Council carries on an ancillary program to supplement its explicit fund-raising activity by means of seminars, regional meetings, presentations by the Director, the Chairman and members of the Rabbinical Advisory Council to local boards of rabbis, publications, etc. It attempts to keep American rabbis abreast of the current situation in Israel and to provide material useful to the rabbi in sermons, bulletin articles and lectures as well as to the committee of the congregation concerned.

In the light of the current emergency created by the mass exodus of Russian Jews, the Rabbinical Advisory Council has scheduled for the week of February 14, four consecutive meetings to take place in New York, Chicago, Los Angeles and



Miami. Every rabbi in America will be invited to participate in one of the meetings. Mr. Nathaniel Peled, Minister of Immigrant Absorption, will come to the United States specifically to address these meetings. An action program for synagogues will be presented at each of the meetings which will include a promotion of the 100% Plan and the utilization of several Sabbaths during the months of March and April to tell the story of the Russian immigration. We expect that every synagogue in America will make a high point of Friday/Saturday, March 24/25, the Sabbath before Passover.



CONFERENCE DEPARTMENT

|                | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|----------------|------------------------|--|------------------------|
| Regular        | \$225,000              | \$200,000                                    | \$200,000              |
| Emergency Fund | 167,000                | 135,000                                      | 120,000                |

The Department is staffed with two employees who devote only part of their time to the needs of the Conferences. One is a fieldman who works in assigned communities and the other performs booking services in the Speakers Department. The salaries of these two staff members are included in their respective departments.

The following is an analysis of the Conference and Meeting expenses budget for 1972:

|  | <u>Regular<br/>Campaign</u> | <u>Emergency<br/>Fund</u> |
|--|-----------------------------|---------------------------|
| <u>National Conference and Meetings:</u>   |                             |                           |
| Annual National Conference<br>December 10-12, 1971   | \$125,000                   | \$ 50,000                 |
| National Inaugural Dinner<br>December 9, 1971  | 25,000                      | 10,000                    |
| January 1972, National Meeting<br>Washington, D. C.<br>January 20, 1972                      | --                          | 20,000                    |
| Executive Committee, Cabinet and<br>Officer Meetings   | 25,000                      | 15,000                    |
| Total - National Conferences<br>and Meetings   | \$175,000                   | \$ 95,000                 |
| <u>Provision for Regional Conferences to be<br/>held in 1972 as required by the Campaign</u> | 25,000                      | 25,000                    |
| Grand Total -----  | \$200,000                   | \$120,000                 |

It is to be noted that attendance at the Inaugural Dinner and Annual Conference for years subsequent to 1967 was considerably higher than at similar meetings in years prior to 1967. The increase in attendance both at the Inaugural Dinner and Annual Conference is attributable to the same changes which brought on the Emergency Fund. As a result, the expenses above normal anticipated expenses were charged to the Emergency Fund. In the face of increased attendance, we were able to cut the costs of these meetings by raising the price of admission and by more efficient management.

The regional program will be increased in 1972 as part of the overall Campaign plan for 1972.

CLOSED CIRCUIT RADIO BROADCAST

1972  
BUDGET

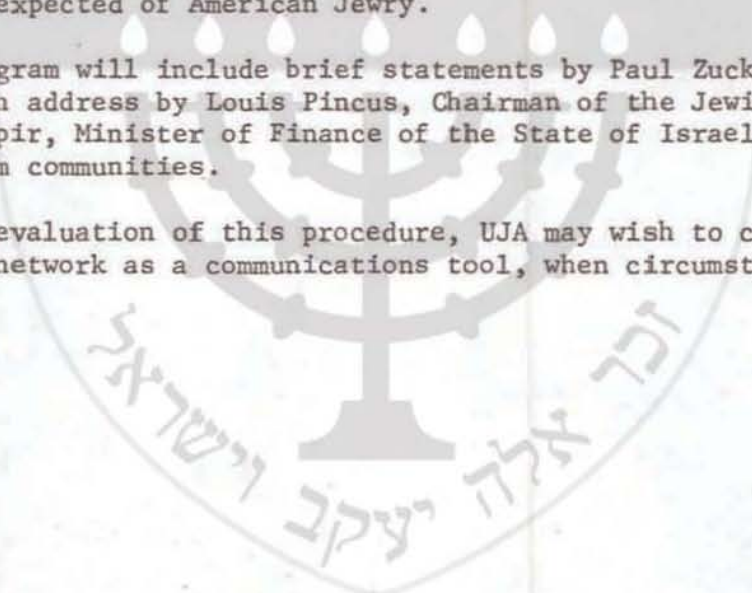
Emergency Fund

\$20,000

On February 6, 1972, United Jewish Appeal, in cooperation with the Council of Jewish Federations and Welfare Funds, will conduct a closed circuit radio broadcast to more than 130 communities. This is the largest number of communities ever reached by UJA at one time, and we will also undoubtedly set a record in terms of the number of individuals reached. A T & T informs us that it is the largest radio network of its kind constructed in the United States in more than 10 years. The network has been assembled in order to communicate to leaders of the American Jewish community the nature of the new crisis facing the people of Israel as a result of a considerable increase in immigration for 1972, principally from the Soviet Union -- and to tell them what is expected of American Jewry.

The radio program will include brief statements by Paul Zuckerman and Max M. Fisher, and an address by Louis Pincus, Chairman of the Jewish Agency Executive. Mr. Pinhas Sapir, Minister of Finance of the State of Israel, will respond to questions from communities.

Based on our evaluation of this procedure, UJA may wish to consider future use of radio network as a communications tool, when circumstances warrant.



GENERAL OFFICE

|                | <u>1971<br/>BUDGET</u> | <u>TOTAL<br/>ESTIMATED<br/>1971 EXPENSES</u> | <u>1972<br/>BUDGET</u> |
|----------------|------------------------|--|------------------------|
| Regular        | \$2,041,500            | \$2,139,000                                  | \$2,140,000            |
| Emergency Fund | 429,000                | 515,000                                      | 555,000                |

The composition of the General Office as of December 31, 1971, compared with its composition as of December 31, 1970, and a projection for 1972 is as follows:

|                             | <u>As of<br/>12/31/70</u> | <u>Staff<br/>Changes<br/>in 1971</u> | <u>As of<br/>12/31/71</u> | <u>1972<br/>Projection</u> |
|-----------------------------|---------------------------|--------------------------------------|---------------------------|----------------------------|
| Executive Department        | 15                        | -1                                   | 14                        | 14                         |
| Accounting Department       | 13                        |                                      | 13                        | 13                         |
| Statistical Department      | 4                         |                                      | 4                         | 4                          |
| Collections Unit            | 2                         | -1                                   | 1                         | 1                          |
| Mailing Lists Department    | 4                         |                                      | 4                         | 4                          |
| Reference Department        | 3                         |                                      | 3                         | 3                          |
| Stockroom                   | 8                         |                                      | 8                         | 8                          |
| Office Manager's Department | 2                         |                                      | 2                         | 2                          |
| Receptionist                | 1                         |                                      | 1                         | 1                          |
| Switchboard                 | 3                         |                                      | 3                         | 3                          |
| Xerox Unit                  | 1                         |                                      | 1                         | 1                          |
| Night Clerk                 | 1                         |                                      | 1                         | 1                          |
| <b>Total</b>                | <b>57</b>                 | <b>-2</b>                            | <b>55</b>                 | <b>55</b>                  |

Payroll:

It is expected that after Union increments and other adjustments, the 1972 payroll item will amount to \$725,000. We expect that in the Fall of 1972 some retrenchment will take place. People retrenched or retired will not be replaced.

Temporary Staff and Overtime:

Because of the increased activity since 1967 it was necessary to hire additional temporary personnel for various departments of the UJA. In addition, this account includes summer help, overtime and the newly created Operation Breakthrough.

In order to provide adequate security for the United Jewish Appeal, three Israeli students are guarding UJA premises in the off hours. The cost per annum for maintaining these three guards is \$20,000.

Data Processing:

This item refers to annual electronic data processing service bureau charges plus annual micro-filming costs. In connection with the Emergency Fund it was necessary to incur additional data processing costs over and above the normally anticipated costs.

Annual data processing charges are broken down as follows:

|                | 1971<br>BUDGET | TOTAL<br>ESTIMATED<br>1971 EXPENSES | 1972<br>BUDGET |
|----------------|----------------|-------------------------------------|----------------|
| Regular        | \$101,000      | \$105,000                           | \$100,000      |
| Emergency Fund | 121,000        | 150,000                             | 110,000        |

The 1971 Emergency Fund estimated expenses includes a one-time cost item of \$47,000 for Systems and Programming work in connection with a State of Israel Bonds computerized perpetual inventory system. UJA received a total of \$17,771,000 State of Israel Bonds in 1971 in payment of pledges to UJA Campaigns. Our auditors, Leob & Troper, recommended that we computerize the processing and inventorying of Israel Bonds for proper control.

Rent:

During 1971 we found it necessary to expand our office facilities. Therefore, we leased 8,000 additional square feet of space on the 23rd floor at 1290 Avenue of the Americas. We are sub-letting this space from Burlington Industries at a very favorable rental.

The breakdown of rent for 1971 and 1972 is as follows:

|  | TOTAL<br>ESTIMATED<br>1971 EXPENSES | 1972<br>BUDGET |
|--|-------------------------------------|----------------|
| 29th Floor - 1290 Avenue of the Americas (including escalation based upon increased real estate taxes and increased labor costs) | \$133,500                           | \$134,000      |
| 23rd Floor - 1290 Avenue of the Americas   | 28,400                              | 60,400         |
| Concourse Level - 1290 Avenue of the Americas  | 4,100                               | 4,100          |
| Total -----  | \$166,000                           | \$198,500      |

Postage:

The major portion of this account represents postage costs incurred by the National office in its day-to-day operations for both internal mailings and mail handled by outside mail services.

Mail Service - Labor:

This account represents payments to an outside mail service for maintenance of UJA mailing lists and for bulk mailings which cannot be handled in the UJA office.

Telephone:

Increased telephone costs are attributable to:

- (1) Follow-up calls for participation in Special Projects such as Operation Israel, Prime Minister's Mission, Operation Upgrade, and Operation Breakthrough.
- (2) Increased pressures for cash necessitating more frequent use of the telephone.
- (3) More overseas calls due to increased travel and Missions.
- (4) Scheduling and organizing more meetings.

A study of our entire telephone system is projected for 1972.

Stationery and Supplies:

Included in this account are stationery, management reporting forms, field memoranda, receipts, accounting and statistical records, office supplies, and Xerox supplies.

Telegrams and Cables:

This category includes domestic wires for Campaign purposes and overseas cables relating to the overseas work of the UJA.

Furniture and Fixtures:

The 1972 budgetary request of \$20,000 represents the estimated amount necessary for normal equipment requirements and replacements as they occur.

Insurance:

Insurance costs for 1971 and 1972 are broken down as follows:

|  | 1971<br>BUDGET   | TOTAL<br>ESTIMATED<br>1971 EXPENSES | 1972<br>BUDGET   |
|--|------------------|-------------------------------------|------------------|
| Automobile Insurance   | \$ 25,000        | \$ 24,000                           | \$ 24,000        |
| Workmen's Compensation   | 4,000            | 3,000                               | 3,700            |
| Group Life Insurance   | 36,000           | 10,000                              | 56,000           |
| Employees' Common Carrier Ins.   | 1,500            | 2,200                               | 2,200            |
| Blue Cross & Blue Shield   | 40,000           | 49,000                              | 52,000           |
| Health Insurance Plan  | 9,000            | 10,000                              | 10,000           |
| Group Health Insurance   | 12,000           | 16,000                              | 17,100           |
| Group Health Dental Insurance  | 8,500            | 11,500                              | 12,000           |
| Employees' Major Medical   | 20,000           | 22,000                              | 25,000           |
| Disability Insurance   | 4,000            | 4,800                               | 5,000            |
| General Insurance (Mainly Fire,<br>Theft, and Employees' Liability<br>covering various offices at UJA) | 7,500            | 12,500                              | 13,000           |
| <b>Total</b>   | <b>\$167,500</b> | <b>\$165,000</b>                    | <b>\$220,000</b> |

For 1971 Group Life Insurance includes a \$30,000 experience rebate. We cannot anticipate a rebate for 1972 and therefore we are budgeting 1972 Group Life Insurance on the basis of exact premiums to be paid.

The 1972 Employees' Major Medical budget includes \$1,000 representing the cost of Major Medical Insurance coverage for Pensioners of UJA and their wives, recommended by UJA Pension Committee.

The following improvements in 1971 had been approved by the Budget and Finance Committee:

- (1) Group Life Insurance -- Increased coverage for Executives and Field Representatives to \$20,000 or annual salary, whichever is higher.
- (2) Group Health Dental Insurance -- Improved Dental Plan for entire staff.

Equipment Rental and Office Maintenance:

This account includes rental costs of several electronic tape typewriters (Selectmatic Typewriters). Also included in this account are office cleaning service contract, costs of typewriter service contracts, dictaphone service contract, NCR service contract, equipment repairs, replenishment of fluorescent tubes and sundry office repairs.

Auditing:

Our auditors bill us on a time basis. We do not anticipate any increase in fee for 1972.

Legal Fees:

Legal costs for 1971 and 1972 are broken down as follows:

|  | TOTAL<br>ESTIMATED<br>1971 EXPENSES | 1972<br>BUDGET |
|--|-------------------------------------|----------------|
| General Counsel Retainer               | \$20,000                            | \$20,000       |
| General Counsel Out-of-Pocket Expenses | 1,000                               | 1,000          |
| Labor Relations Attorney's Fees        | 4,000                               | 4,000          |
| Sundry Legal Costs                     | 12,500                              | --             |
| Total -----                            | \$37,500                            | \$25,000       |
|  | =====                               |                |

Unemployment Insurance Tax:

Non-profit organizations are becoming liable for Unemployment Insurance Tax in an increasing number of States. Presently, UJA pays Unemployment Insurance Tax in New York State, Pennsylvania and California.

Social Security:

The Social Security Tax rate is 5.2 percent of salary up to \$9,000.

Provisions for Severance and Retirement Benefits:

The rate of contribution recommended by our actuary is 16.9 percent of base salary. Included in the 1971 budget is a one-time amount of \$38,000 to cover additional benefits under the Amended Plan for people who have formally retired and are receiving benefits from the Pension Plan. This one-time expenditure of \$38,000 had been approved by the Budget and Finance Committee.

Miscellaneous:

A major item in this category is our annual subscription to 800 copies of the Near East Review.

This account also includes items such as storage rental, bond redemption expenses, losses incurred on disposition of automobiles, obituaries, advertising for help and many other items not specifically related to other categories.

One-Time Cost of Office Re-Design and Construction:

With respect to our acquisition of space on the 23rd Floor, it was necessary to incur expenses in connection with office layout design and construction.

In addition to design and construction costs, this account also includes necessary purchases of furniture and equipment applicable to these changes in office layout.

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HR:FF-2/4/72

