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Campaign techniques. 1971-1982.

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American Jewish Archives website.

Tape 1, Side 1

ARGUMENT 1. Why ask me for a leading gift - or a large increase - I will do my duty - I'm the wrong guy.

REBUTTAL a) Turn it round - you're the right guy - you are a leader - you have to set the pace - just because.

A. What's going on over there in Israel - there is too much military spending (or anything else that the prospect might object to in Israel.)

R Our money goes for the social welfare, immigration, absorption, education, health, etc. - with which you can't really object.

A. This is the wrong time of the fiscal year - come back to see me in a few months.

R The time is now, the campaign is now, Israel needs it now.

A I have to check with my accountant.

R You are a successful business man who makes your own key decisions in your business life. This matter of a gift is a key decision, your accountant can't tell you how much to give.

Tape 1, Side 2

1. Check on gift of local lay leader who is in on solicitation - make sure it is adequate.

2. "Third voice" is useful.

3. Rating-use early.

A. I don't like what your solicitors are doing, pushing me every year, when will it end?

R I'm not wrong - I'm right - I'll have to come to you every year, needs are greater each year.

A. Every year there seems to be a crisis - when will it stop.

R No crisis ^{anymore} for Jews in Germany, or Poland or North Africa ~~in the future~~. Maybe 25 years from now there will be no crisis in Israel.

A. I have other obligations - sickness, mortgage, Bar Mitzvah, special expense.

R) In honor of ^{your son's} his Bar Mitzvah, extend yourself.

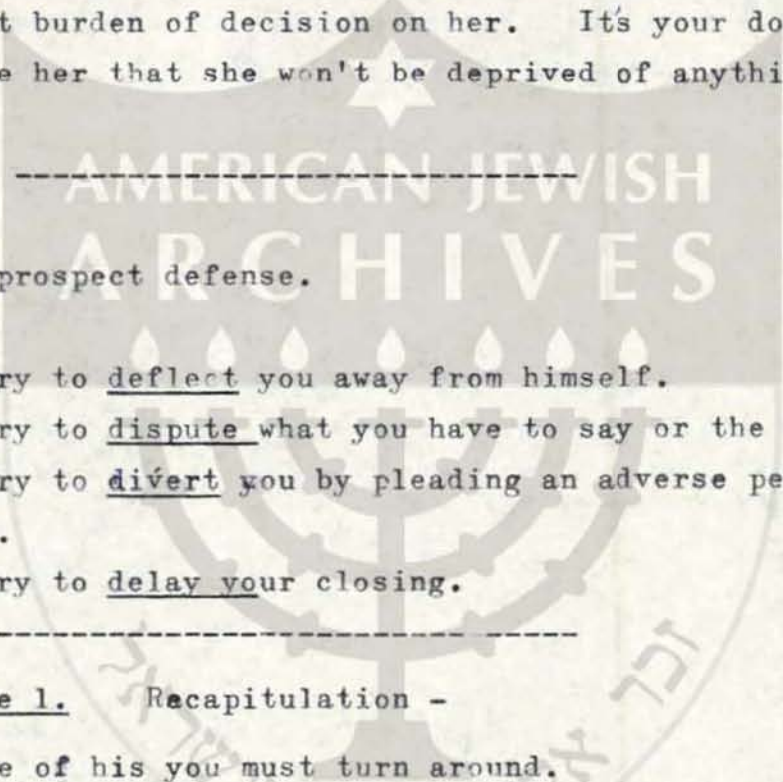
Don't use your personal joy as an excuse.

You'lll feel better if you give what I am asking.

A. I can't answer because I have to talk to wife. Will call you in a couple of days.

R) Do it on your own. She'll feel proud - she'll back you up!

Don't put burden of decision on her. It's your dough. You decide, and assure her that she won't be deprived of anything.



Four D's of prospect defense.

- 1. He will try to deflect you away from himself.
- 2. He will try to dispute what you have to say or the way you say it.
- 3. He will try to divert you by pleading an adverse personal or business situation.
- 4. He will try to delay your closing.

Tape 2 - Side 1. Recapitulation -

every defense of his you must turn around.

- 1. He says: not me; you say, yes exactly you, your gift is a vital one.
- 2. He says: I don't accept the campaign story, the continuing crisis; you say, ~~xx~~ the story is continuing human need and you have to ~~xxxx~~
- 4. buy it because you/ are a responsible Jew.
- 3. He says: You can't tell me what to give; you say, your community is telling you what to give, as a man of your stature.
- 4. He says; I can't make that kind of decision myself; you say, you are the kind of man you are precisely because you do make vital decisions.
- 5. He says: not now, I need time; you say, now is the time, when your gift can be most effective.

Tape 2 - Side 2

Good full solicitation at the beginning of this tape, all arguments very *well* employed.

Arguments

Answers

- | | |
|---|---|
| 1. I have to take care of non-Jewish causes | : Nobody but Jews take care of Jewish needs. |
| 2. Bad economic situation | : Have you denied yourself anything? |
| 3. You are putting too much pressure on me. | : the obligation comes from the need. |
| 4. Call me back | : Decide now, your kids will be proud if you save a Russian Jewish brother. |



A

PHILOSOPHY OF SOLICITATION

1. נדבה Hand Out
2. צדקה Just Contribution
3. תרומה Contribution - Building of buildings

All these are philanthropy - old UJA

4. מעשר מט tax, 1/10

This is the basis of Operation Breakthrough

If it's taxation then:

1. We have the right to know how much the prospect has, all about him.
2. The right to assess, to size up, to rate.
3. Use the word: taxes are owed - you owe us.

If you live beyond your means, give beyond your means

Borrow for Israel - based on high net worth,

Salesmanship requires the enthusiasm of contagion.

B

PSYCHOLOGY OF SOLICITATION

- I a. Suspect - a candidate. learn what he has and what he gives
If he has more than what he gives he is an
- b. Expect - This becomes the working list
- c. Prospect - is a person about whom you know enough so that
you will go to see him.

You must have (i) ENTREE - it is of importance who brings you in.

ii. CONDITIONS - where to see him: office is worst

iii WHO DOES THE SOLICITATION

d. Then he becomes a donor.

c. After that he must become a worker.

II. GETTING THE FACTS SO THAT YOU KNOW YOUR PRODUCT -
BETTER THAN YOUR PROSPECT, WHO BUILDS A SELF DEFENSE
MECHANISM

Don't talk 15 minutes, let the customer talk from the beginning. He has previous facts and knowledge - let him reveal himself - then you can answer him. He also has previous opinions let him reveal them. He also has psychological prejudices - let him air them. (He hates the community, or UJA or the chairman Give him new facts; new opinions; new emotions. You must get him to change.

III Know background of man, is he golfer, orthodox, liberal, etc. Find out his personality, especially what type of group he belongs to, for he will usually react as his group does.

IV SATISFY THE NEED

1. Biological needs
2. Security needs
3. Social needs
4. Self esteem, self realisation needs (but these must be created.)

Solicitation is toughest sales process because it is hard to figure out what need is being satisfied by giving away money. You must create the need and then present the product to satisfy the need.

Create curiosity - and then sell a book to fill that need.

V COMMUNICATION

Transfer symbols in hope of creating meaning on the other side. Force other man to listen, because he hears what he wants to hear, not necessarily what you are saying.

A SOURCE Solicitor - look into my eyes
give a touch on knee, or shoulder or hand
do it now

PREPARE YOUR APPROACH - Think carefully what words to use as code words - to strike deep in him.

FEEDBACK - Get the prospect to react to your code words
This is the only way you know what he is thinking.

C

TECHNIQUES OF SOLICITATION

10 Major Objections Of People To Giving Money - How to Counter

1. Not interested in chauvinistic approach to Jewish life not religious, intermarried etc.

Answer: The world considers you Jewish its not your decision
Hitler went after people like you
Why do Jews have 28% Nobel Prize Winners? Emphasis on education

2. America first - patriot

Answer: Universalism, goy complimented Jew in 67

3. Other commitments, - universities, museums, Negroed
4. If war is imminent, why bring Russian immigrants
5. Lack of cash
6. Why doesn't Israel withdraw and make peace?
7. I give to orphanages and yeshivas in Israel

8. I gave last year beyond my capacity

9. Business is bad.



Allen Rose

UIA CAMPAIGN 1977

Clearly the potential contribution of the Melbourne community is at least twice the present level. With proper organisation, it should be possible to comfortably lift our contribution total from its current level of \$4m. through \$6m. to \$10m. within two years.

This can only be achieved if we become PROFESSIONALS in every aspect of our campaign, i.e.

- Professional - Planners
- Professional - Organisers
- Professional - Canvassers
- Professional - Collectors

To be professional requires a combination of highly experienced professional (paid) organisers, canvassers and collectors, working closely with properly trained key workers, to organise, canvass and collect.

Success depends on a proper mixture of the two elements
(experienced professionals and trained key workers) together
understanding the key objectives of the campaign.

FIRST REQUIREMENT

A master plan encompassing the complete community.

It is imperative to understand that the only effective canvas
is by personal interview - preferably by two key workers
accompanied by a professional.

No substitute is effective - certainly not telephone calls or
reliance upon contribution at appeal meetings. The former
provides an avenue to easily contribute "the same as last year"
and the latter an opportunity to hide a decrease within the bulk
of other contributions.

The contributors must be subdivided by grade of contribution
and/or ethnic or group association. The grading decision is
critical and only after this has been expertly resolved can the
campaign properly commence.

Decisions must be decided with the parameters of our key worker manpower potential, and the campaign based on the findings. (E.g. with only five key workers then the limit of effective personal canvassing is probably 50 contributors - so the balance has to be covered by some less effective programme).

However, graded by size of contribution, we must canvas in all contributions of \$2000 and over (and hopefully \$1000 upwards).

At least 90% of our total effort must be in this direction which in itself requires much pre-planning, especially -

1. Recruitment of canvassers.
2. Proper training of canvassers.
3. Correct briefing.
4. Proper supervision, encouragement and administrative support.

Our priorities must be correct, and I would suggest the present concentration on small group meetings abandoned.

The required professional help probably has to be recruited overseas, some on a permanent but most on a temporary basis. Also we should send potential organisers for training overseas, if it will improve our performance.

RECOMMENDED ACTION PLAN

1. A small committee be established to submit by July 15, an outline plan for 1977. The committee to include one representative, each from four groups - young persons, middle group, top bracket and administration - maximum six persons.
2. July 31 - Plan adopted, after any required amendments.
3. August 15 - 1977 campaign executive elected and charged with immediate implementation of plan.
4. September 20 - Final details of every aspect of campaign by September 20.

5. October 18 - All administrative and personnel arrangements completed.
6. November 1 - Form groups and commence training programme.
7. December/January - Send maximum number of ^{day} workers on study missions.
8. February 1 - Pre-canvassing commences as planned programme.
9. May 1 - Campaign commences.
10. June 1 - Campaign completed, hopefully marked by a gala function to celebrate success.

These thoughts have been written to provide constructive discussion - they are not intended as a firm view.

May 24 1976

CAMPAIGN TECHNIQUES

SOLICITING
PARLOR MEETINGS
MEMORANDUM

RECEIVED

JAN 17 1972

Date January 13, 1972

Rosen

file
MP
Pax
Wenzel
Nesher
3
1/17

To Mr. H. E. Rosen

From Alvin H. Gilens

Subject PACIFIC SOUTHWEST LEADERSHIP SEMINAR
JANUARY 9, 1972

The first Pacific Southwest Leadership Seminar was held on January 9, 1972, at the Towne House in Phoenix, Arizona. Fifty persons attended (attendance list attached) representing ten communities. Seven community Campaign Chairmen were present. The entire delegation from Denver was forced to cancel at the last minute due to illness.

Prior to the Conference, several position papers were prepared and sent to all reserved attendees - copies are attached. These were used as points of departure for discussion.

National UJA Chairman Bram Goldsmith of Los Angeles called the meeting to order at 10:15 a.m., explained that Louis Degen of Denver, who was supposed to lead discussion on Credibility of Needs, was ill, and initiated discussion himself. Quota meetings, Operation Israel, and use of Israelis were all discussed as means to establish the credibility of the campaign. The discussion proceeded well with various communities expressing their problems and solutions until lunch was served.

Immediately after lunch, a pre-arranged telephone call was received from Edward Ginsberg, and his report on the current overseas situation was broadcast to the meeting through an amplified telephone.

Dr. Aryeh Nesher next made a two-and-one-half hour presentation on soliciting which created much discussion and was very well received. Unfortunately, Norman Rosenblatt of Salt Lake City left at lunchtime because he was ill and so his report on the use of outside solicitors was not discussed, although it had been touched upon in the morning. Following Dr. Nesher, Ed Gamson, Parlor meeting Chairman of Los Angeles, led a discussion on the Parlor meeting approach.

Bram Goldsmith asked that each person present give him one day per month for the next two months to go to another community with someone else, to solicit. Seven persons volunteered, three of whom were new to this endeavor.

The meeting was adjourned at 4:30 p.m. with the expression by the attendees that such a meeting was very useful and that more should be held.

During the course of discussions, it was expressed that there are many potentially big donors in small communities, and they need help in getting to them. It was resolved that the Western Region Office would send out a prospect information form to the communities and act as a clearing house for solicitations. The form will be returned to the Western Region Office with as much information as possible, and UJA will then try to obtain any possible additional information. Alvin Gilens will then coordinate solicitation of these prospects with Bram Goldsmith, using Aryeh Neshet where appropriate.

7 | | An additional problem loudly discussed was a lack of useful campaign information. Aside from UJA staff and community professionals, only a few attendees are receiving the JTA BULLETIN. It would be useful to send a three-month subscription to each person who was invited to the Conference. Many persons receive the Near East Report, but this is inadequate for overseas facts. The JDC Newsletter would also be helpful, if this is possible. Following our discussion with Executive Director in Los Angeles two weeks ago, it would appear that lack of communication - or lack of communicable facts - is a real problem. Perhaps we who live in large cities and are tuned in to the problems do not appreciate this lack of information in small communities.

Physically, the room was set up in a large hollow square, 14 seats per side, so that everyone faced everyone else. Large sign cards with name and community stood on the table before each person. There was no head table, no lectern, no mike. I believe there was a closeness of feeling as a result of this arrangement. Lunch, in an adjoining room, was set the same way. Seating was not assigned.

Bram Goldsmith will be sending out a follow-up letter to everyone invited to the Conference. We would like to include the word that everyone will receive a trial subscription to the JTA. Please advise. We will contemplate another such Southwest Conference in about four months.

ag

AHG:eb

UJA SOUTHWEST REGIONAL CONFERENCE

Phoenix, Arizona
January 9, 1972

* * *

ARIZONA

PHOENIX

Milton Corwin
Elliot Emerson
David Frazer
Jim Freedman
Ted Kort
Neal Kurn
Dr. Harold Shapiro
Warren Silver
Saul Silverman
Yale Simon
Herbert Smith
Harry Swirnoff

TUCSON

Benjamin Brook
Donald Diamond
Jack Sarver

CALIFORNIA

BARSTOW

Jan Saltzman
Edward Stein
Herbert Stein

LONG BEACH

Robert Baldwin
Sol Frankel

LOS ANGELES

Edwin Gamson
Bram Goldsmith

PALM SPRINGS

Seymour Levy

SAN DIEGO

Robert Caplan
Stanley Foster
Lawrence Hirsch
Marvin Jacobs
Louis Lieblich
Alan Price
Herbert Solomon
William Starr
Irving Stevens

NEW MEXICO

ALBUQUERQUE

Harold Albert
M/M Herschel Sedalnick
Jonathan Sutin
M/M Yale Weinstein

TEXAS

EL PASO

Dr. Dan Geller
Oliver Winkler

UTAH

SALT LAKE CITY

Harry Altschule
Norman Rosenblatt
Fred Tannenbaum

UJA STAFF

Alvin Gilens
Fred Hait
Harry Karchmer
Abe Levy
Robert Magid
David Sacks
Dr. Aryeh Neshet



TECHNIQUES OF OUTSIDE SOLICITORS FOR UJA DRIVES

COMMENTS BY NORMAN ROSENBLATT - SALT LAKE CITY, UTAH

Prior to 1970, the Salt Lake United Jewish Appeal drive did not use outside solicitors, with the minor exception of some years back, an experience which was unsuccessful. The attitude toward outside solicitors was, as it is in many communities, negative, fearful and distrustful. The attitude of the community here was that they know how to run a drive, that we had been doing it the same for many years, and that we didn't want to high-pressure any of our people with the big guns from outside. For the 1970 campaign, as Chairman, I felt that the needs of the drive were so great that the time had come to change our ways. We brought in the famous Stein brothers from Barstow, California. The results were tremendous. We increased our totals from somewhere in the neighborhood of \$160,000 to \$220,000, and I attribute most of this increase to the efforts of Herb and Ed Stein. I believe that drive Chairmen in Salt Lake henceforth will be committed to the principle of using effective outside solicitation. I have had experience from the other end, having solicited in El Paso and in Spokane as an outside solicitor. Viewing the matter of outside solicitation thus from both sides, I believe I can make some comments on it which I hope will be helpful.

THE VALUE OF AN OUTSIDE SOLICITOR

The first reason is that he brings a fresh approach into the community. After awhile, any community, particularly small or medium size-ones, find that the leadership of the UJA drive is generally the same group of people. Whether they do an effective job or a mediocre job, it is inevitably a small group of concerned Jews that spearhead the drive. Inevitably, the result will be the perpetuation of habit. No matter how effective the techniques and practices of any given drive leadership in the community may be, what worked last year will, of course, be utilized this year and next year. An outside solicitor brings in new ideas and a fresh approach which keeps a community out of a rut.

The second value to an effective outside solicitor is that he can, if he is a good solicitor, provide a seriousness of approach and a believability that a hometown solicitor perhaps cannot provide. I am speaking here, of course, of smaller towns, where everybody knows each other. I have had no experience with big cities, so I can't comment too well on this. But, when the UJA solicitor comes around and he is your poker-buddy or your lawyer, or your daughter-in-law's uncle, somehow you know his approach.

The third value of an outside solicitor is that he can provide to a prospect the serious idea of what the prospect's responsibility is to his people. Very often in a small community where there is relatively little exchange or contact with the outside world of Judaism, the frame of reference for giving becomes extremely narrow. I have seen communities where \$10,000 was considered an extraordinarily good gift. This kind of giving had no reflection on the community's ability, but only on its narrow perspective, which a good outside solicitor can change. We can tell prospects about levels of giving, including, of course, his own, that are far beyond that which the community knows. He can quietly and persuasively embarrass a community into a realization of what is truly expected of them.

Fourth, a good solicitor and one who gives at a good level himself, provides an example to a community of a kind of giving that the community does not know. If he himself gives at a good level for his particular circumstances, the prospect must listen to him and consider his own responsibility in that light.

The fifth value of an outside solicitor, an effective one and a dynamic one, is that he can provide a source of leadership inspiration in the community which, of course, is one of the major problems facing all the communities I have seen in the Western part of the United States - lack of dynamic leadership within the community. There are plenty of dynamic leaders among the population in the communities, but they haven't been inspired or "turned on", to use the current vernacular. A good solicitor, to whom some UJA solicitation and UJA work is a mitzvah, can often provide that kind of leadership inspiration in a community. I know full well that Ed and Herb Stein did so in Salt Lake City.

The second subject concerns the qualifications of an outside solicitor. They are intangible and they are qualifications that the community cannot prejudge. My principal business activity is in sales management. I find that establishing criteria for a good salesman is an impossible task. A good salesman is one who gets orders. Perhaps the same applies to a UJA solicitor. There are some obvious criteria. He must be a sensitive person, a fairly dynamic person, and one whose real concern for Jews and Israel is evidenced in his own level of giving.

The third general subject is the responsibility and the attitude of the community toward the outside solicitor. The community must make a basic decision that they would use the outside solicitor effectively before they permit him to come in. Young Leadership Cabinet men should never be used to make an emotional spiel at a large dinner or luncheon unless that is an incidental part of their trip. If the community is going to utilize an outside man to solicit the 15-20% tough marginal fringe that never gives anyway, that solicitor should not waste his time. In every community we have these kinds of Jews whose attachment is marginal and whose giving has always been zero or close to it, despite repeated attempts at solicitation. Some of these people sometimes can be effectively solicited by an outside man. The community should never look up at outside solicitors as miracle workers. They are not. They can only help to bring about a successful drive among committed Jews. I believe it is effective to bring in one or two - preferably two outside solicitors - for a period of one or two days, but during that two or three days the community must be organized to make maximum and effective use of these people. First, by seeing to it that the top people in the community are going to work with the outside solicitors. Second, by seeing to it that appointments are made with prospects of real potential. Often, of course, I have found it is better to simply walk in on some kind of people, but the leaders of the drive in the community should know which prospects need to be seen with appointments and which can be visited with a spontaneous call.

PRE-EVALUATION OF POTENTIAL

Chairman of the drive, or those who are the real leadership people behind the drive if it is not the Chairman, must be in a position to effectively and realistically evaluate the prospects, and I believe that they must be able to do so with the perspective gained from the kind of meeting that we will have in Phoenix on the 9th. If a Chairman evaluates on the basis of the past habits of his community, no real results will come out of the drive. If he evaluates on the basis of what others are doing in other communities, there might be some potential. Evaluation of prospects is, of course, an entire vast subject itself and beyond the scope of this report. But to ask an outside solicitor to evaluate a prospect on the way up to that prospect's front door is a verbal disservice to the solicitor and to the community itself. I believe that the Chairman of the drive should prepare a list of prospects, along with their

evaluation, and this should be done well before the arrival of the outside solicitors. However, the most important part of the use of outside solicitors is that of organization. If outside solicitors arrive at 9 o'clock in the morning and they sit around a hotel room until noon, at which time they are called for a luncheon ending at about 2 p.m., and then are used for about two hours or three hours solicitation in the afternoon and then are through for the day, their time is totally wasted. The community has an obligation to the outside solicitors as well as to itself to utilize the solicitors for every possible minute that they can for effective solicitation. The Chairman or the drive committee in the community must decide where the cut-off level will be for an outside solicitor. Generally, outside solicitors should, of course, only see substantial prospects. To waste the time of an outside solicitor on a \$2-300 prospect is a sad waste of a vital asset.

The fifth aspect of a community's use of outside solicitors is that of the protection society. In every community, the leadership of the drive will inevitably have a few families or people that are being protected from solicitation. Unfortunately, those that are being protected are often the pacesetters of the drive, and they are too often not effectively solicited because they are hidden. If the leadership of the drive is not committed to getting rid of the mutual protection society, there is no possible chance for an effective drive.

The sixth aspect of the use of outside solicitors concerns the actual techniques. First, in making an appointment with a prospect to bring in an outside solicitor, the prospect should very frankly and firmly be told why he is to be seen. I have been on calls where an attempt has been made to deceive the prospect, and he is always surprised when he finds he is being solicited for UJA, and often resents it. The reason an outside solicitor should be seen by any prospect is that the outside solicitor has come to the community on his own, at his own expense, out of a real concern for the needs of his fellow Jews. The leadership of the community drive never needs to apologize for this, and never needs to apologize for his own concern. When the solicitor or solicitors are introduced, I believe that the prospect should be told that they are there to talk about that prospect's UJA contribution, and that the outside solicitors that are with him are non-paid volunteer laymen, that they are coming into the community because of the fresh approach that they bring, and because they set an example of giving which is unknown to the community. This is not always true but it is usually truer now so that it can be said with safety. At that point, the community contact should sit and listen and permit the outside solicitor or solicitors to do their work. My experience has been that two outside solicitors and one community man on a single call is most effective, but I have had experiences where the outside solicitor has made an extremely effective pitch, has come down close to the wire, has the prospect sweating, only to have the community contact, by some inadvertant remark, let the prospect off the hook. In two or three cases that I have seen, it has cost the UJA money. The community contact should be prepared for an outside solicitor to be persuasive in every sense of the word, but he must, of course, remember that the outside solicitor is performing an honorable task and one which requires no apology.

In summary, I would say that a team of outside solicitors in a UJA drive can be a most effective supplement if properly used to solicit the basic giving corps of a community. If a community expects to have a solicitor only to see the marginal few or, on the other hand, if a community expects the outside solicitors to make the drive for them, it won't work, and the community should either

reorganize this drive or wait until next year to use outside solicitors. But I would strongly urge any drive Chairman who has reservations about using outside solicitors to consider the possibility that if a team of outside solicitors is properly used on a well organized basis, it can make the difference between a good campaign and a very good campaign.



REDISCOVERY OF THE PARLOR MEETING

Presented by Edwin Gamson at the
Southwest Regional Leadership Seminar

All methods of fund raising have their place in the annual United Jewish Appeal. In summary these may be categorized as follows:

1. Personal Solicitation:

Volunteer workers are either assigned or are asked to select a specific number of cards for personal solicitation. The worker either by phone or personal visit attempts to encourage the potential donor to increase his gift.

2. Community Meetings:

This technique assembles that portion of the Jewish Community covered by the established criteria of the meeting. After the dinner and the help of several speakers, cards are called with donations announced.

We in Los Angeles, in our 1970 campaign, rediscovered the technique of what we call "Parlor Meetings." The purpose of the informal meeting in the home of a respected individual is directed towards the objective of more than a donation, more than charity, more than a "Jewish Tax". We are after total and unrestrained commitment.

I would like now to construct the anatomy of the parlor meeting concept as we in Los Angeles developed it. The Genesis was during the first mini-mission of the U. J. A. in December 1968 when a large group of the Los Angeles Jewish Community saw Israel for the first time. This mission, led by Rabbi Herb Friedman, was to change many of those on the mission, our attitudes towards responsibility to the world Jewish community; our capabilities as individuals to make an impact that could affect the course of history, not only of our people but perhaps the world; our responsibilities to maintain a Jewishness in every facet of the world community and finally our undying pledge that there must now and forever be an Israel.

The Los Angeles group ended a gloriously tiring day in a kibbutz near the Syrian border sitting around a fireplace while a terrible storm was thundering outside. It was there that this beautiful informal, unplanned, emotional experience took place. Someone, I forget now who, started to describe his personal uninhibited feelings as to what these few days in Israel meant to him. Someone else then took over describing similar yet somehow uniquely different effects. This happened again and again until we all had an opportunity to express the so very personal chemistry that this experience meant to each of us. Ultimately, the question of what we should do was translated spontaneously into dollars with no pressure except that which we ourselves generated. Each of us left the room with a new dimension added to our life. We were committed Jews, instead of feeling that our dollars were charitable donations we felt instead that it was our job, our duty, our magnificent obsession.

We vowed that what happened to us must be made available to everyone we could possibly reach in our own Jewish community. At the start, parlor meetings were held by those of us that visited Israel on this and other missions. Now in our 1972 campaign we are organized such that this technique is the backbone of our fund raising program. Even with this expansion we attempt, and I believe, do capture a little of the magic that happened to us in that kibbutz in Israel.

Allow me now to paint a word picture of a typical "parlor meeting." While you are reading this, think of the times during telephone solicitations you were brushed off with a nominal increase or none at all. Also think about the rather frigid environment, a large "card calling" solicitation meeting when the group upon leaving would render a sigh of relief that that's over with until next year.

It is your home, you have invited 15 to 20 of your associates, friends or neighbors for cocktails and dinner. They are made aware that they will be expected to make their commitments during the evening. In some rare cases this will cause a few not to come but this, as I said, is rare. Assisting you as host are one or two "lay leaders" in the Jewish community, a guest speaker (perhaps a young soldier from Israel or a recent Russian immigrant). During the cocktail hour and prior to dinner you will

direct the lay leader to those individuals that would be good targets for pre-solicitation. Your guests from Israel informally meet with your friends. They may talk of philosophy, the war threat, the human needs, more importantly, your friends begin to feel part of the scene directly and intimately. They discover that these are not schnorers, instead are men of vision and dignity.

After dinner, it is you that welcomes everyone, introduces the speakers, first the guest, next the lay leader to restate why commitments are needed. You, as host, will be asked what the evening meant to you; and if directed carefully, a monolog suddenly and spontaneously becomes a dialog. Why are we here?, will not be asked by anyone. People with specific limits of donations, as they walked into your home will find themselves making significant increases and feeling good about it. I have attended over 50 parlor meetings and have yet to not been rewarded by the attitudes of my fellow Jews. Parlor meetings are emotional experiences, a psycho-drama very close to home where we all suddenly recognized that no one but ourselves will help us. Therefore, we must, given a chance, talk about our views, our deep seated anxiety and our dreams of the future. We Jews when we are in a Jewish home visiting with other Jews let our defenses relax and become for an instant close to God and understand why we are what we are and always will be, a family of tradition.

All of these emotional outpourings can and, I assure you, do happen at a parlor meeting. Ask yourself if they can happen at large "card calling" affairs or telephone solicitations.

NOTES
TO PARLOR MEETING HOSTS

1. A parlor meeting is a personal affair. It is a situation where one person has invited another - usually a friend - to his home for dinner and drinks to hear about a subject of mutual interest.
2. The optimal number of a good parlor meeting is ten to fourteen men, but in any certain situation this can be expanded or contracted.
3. The invitation to a parlor meeting should be informal. It is not even necessary in most instances to send out a formal letter, usually a telephone call should suffice asking a person to come to your home on a particular night to hear an interesting program and meet with other men of like mind.
4. It is very important that the person invited to a parlor meeting has potentially equal giving ability with the others. The process should include "birds of a feather," where nobody is embarrassed and where nobody is competing with a person of far greater giving ability; and, of course, when the invitation is extended, a person should know that it is for the United Jewish Welfare Fund and the Israel Emergency Fund and they will be asked to make their contribution.
However, they should also be informed that under no circumstances will any pressure be placed upon them or will they be made to feel uneasy in any way.
5. You do not have to serve a complicated gourmet dinner. This should be a casual affair. The men are coming not primarily for dinner. They are coming to join their fellowmen to hear an important story and to respond.
6. Of course, the meeting is stag.
The best type of parlor meeting is at a person's home called at 6:30 in the evening. This leaves plenty of time for drinking before dinner and meeting the various guests and speakers personally.
Dinner should be served between 7:45 and 8:00 p.m. and your host and hostess so informed when you schedule the meeting. The after-dinner meeting should begin by 8:45 to 9:00 p.m. and generally concludes between 10:00 and 10:15 p.m.
Presolicitation during this drinking and eating period is a natural concomitant which will be present among the guests invited and with the speaker who will join your meeting.
7. Your guests will interpret different meanings to your remarks and to the remarks of the featured speaker. Please encourage dialogue. Invite each guest to expose his feelings, his attitude as well as his commitment.
8. A parlor meeting is not a cold card calling affair. As a matter of fact, although you will have a record of the giving of each guest for your own information, no cards will be signed or passed out for signature at any part of the evening.

We will let you know as early as possible who will be the featured speaker at your home and give you his biographical background. The guest speaker in many instances will be an Israeli Army officer. (We do not depend on them to do the actual fund raising.) A campaign committee leader who will talk on this year's needs, after the speaker, will announce his commitment but unlike regular fund raising meetings, he will not call on someone to ask what he plans to do; instead, for example, he will turn to one of the invitees who has already made a decision during the earlier activities and ask him, "How do you feel about what we heard tonight," or "You know the story as well as I do, Joe, what are you planning this year?"

Invariably such a person will take a few minutes to talk about his concern and interest in the campaign and always end with the announcement of his gift.

All of our experiences through the campaign has proven that these meetings are very friendly and successful. I am sure yours will prove likewise.

Southwest Regional Leadership Seminar, Jan. 9, 1972
Phoenix, Arizona

CREDIBILITY OF CAMPAIGN NEEDS FOR 1972
BY LOUIS DEGEN
DENVER, COLORADO

The credibility of the needs expressed in the 1972 Campaign will be^a crucial element in the success of the Campaign. This is true because the needs in the Campaign are of such tremendous dimensions that they leave themselves open to the usual reaction that these are set up as campaign gimmicks or the 1972 needs are simply a magnification of what has been going on for a number of years. There is also another grievous danger: That the true gravity of the situation with all its dangers will not get through to the public unless we can establish the credibility of the needs.

The fantastic scope of these needs become self evident as we list them:

Immigration: An historic move has taken place here. There had been a trickle of immigration to Israel from Russia (a total of 4,259 Jews from Russia during 1968, 1969, and 1970). At the beginning of December the situation changed rapidly. The Russian Government began to allow an immigration of Jews in excess of 100 per day. This means a total immigration from Russia alone of approximately 36,000 in 1972. There are 70,000 applications for visas on file in Russia. It is reported that some 90,000 Jews from Georgia, Russia would like to go to Israel. The dimensions are enormous. The cost is \$10,000 per person for the transportation and absorption of a refugee. In this item alone Israel would require an additional \$250,000,000.

Defense and Hostilities: Considering all sources of projected income the Israeli budget is now short \$1,000,000,000. This is figured as merely to maintain the situation as it is at the present time. Should hostilities break out all estimates will fall far short.

Internal Problems: Never has Israel been harrassed by major internal social problems: The acute poverty, the Panther situation, lack of educational and

health facilities.

At stake is the future of Israel. The Jews in the Soviet Union and in other countries. The impact may be felt for years and decades. To meet all these needs \$450,000,000 needs to be raised, which include \$100,000,000 for home needs. This is \$200,000,000 more than was raised last year when we raised the largest sum in our history.

How can we get the contributors to believe that never have all these major problems descended upon Israel at once and in the great magnitude in which they exist. If we can establish the credibility of this complex of problems, the public will respond. If not, all the gimmicks in the world will not produce the results.

While there may be many ways of establishing credibility there are a few basic principles that go along way toward doing so. Certainly there is no better way of proving credibility than for contributors to contribute in such sums that others must conclude that the cause for which they contribute must be valid. In a society where problems, particularly with respect to Israel, are so complex that the average person is not equipped to study them in detail, this method becomes one of the utmost importance in establishing to the community the "credibility of the needs." Who then are these individuals to whom the community looks to establish this credibility by being willing to give adequate contributions to the campaign? They fall into two categories: Those who have the potential to give large contributions and the leadership of the community. However, it is not enough for them to simply contribute adequately. If their contributions are of such a dramatic nature that the public will conclude "if that man contributed such a large sum, there must indeed be a critical situation far beyond what we have had in the past." Without this step credibility cannot be established and no campaign can be successful.

How then do we go about this first step in credibility? We must single

what they feel should be a contribution to measure up with the needs for each individual. This then becomes the goal for that individual's gift. There can be some preliminary education and orientation by informal contacts with these individuals, by communications continuing to bring to them highlights of the situation. The very next step is to arrange to see these individuals where they can not only learn about the needs at first hand, but come in body-to-body contact with those individuals who are effected by these needs. In Denver we began with those individuals whom we felt had the highest gift potential. We arranged for a team consisting of a local individual, a UJA representative, and an Israeli. The point of contact with the prospect was our local individual who made the appointment. We developed a pattern for these person-to-person solicitations whereby the Israeli presented the situation. This gave an authenticity and a credibility to the needs that no amount of narration by anyone else could accomplish, for here was an individual who was being exposed to all the problems, who suffered before the very eyes of the contributor. It is often a difficult thing, but not entirely out of question when one talks of very large sums (in the case of Denver we reached for two \$1,000,000 contributions) for the local individual to present the goal or the request of the contributor. Without making a request for a specific amount few solicitations can be successful. This role can sometimes be done by the local individual or if the sum is of such dimensions it may have to be left to the outside UJA representative who may be freer to make such a large request. Our response to this preliminary "request priming" has been very successful. A good part of this success is inherent in the fact that the Jewish Community through all that it has read and heard understands the implication and the dangers in the situation and has perhaps been never more ready to respond in the dimensions of the 72 Campaign, whereas in previous years it may have been difficult to pin down specific gifts or we may have met with some feeling which, though perhaps not hostile, carried with it the implication "I'll do my share." So far we haven't run across this attitude.

"After having gone through what a community may feel is a sufficient number of prime gifts" done early, we have established that at least in the eyes of those who have a great potential of giving that they believe in the needs and are willing to "put their money where their mouths are." This is a powerful argument for the general community.

We are therefore now ready to use this feeling of conviction to establish a quota or a goal for the whole community. A goal can readily be established by a resolution at a Board Meeting, but it has little validity or credibility. Accepted by those who can implement it with the most significant gifts, it has both credibility and viability. We are now prepared to call a quota setting meeting. To this meeting we would invite the Board of Directors of the Federation and the leader contributors. Here too the same elements should prevail. Presentations should be made by those who are effected by the situation, Israelis. Added to this we need a UJA representative who can present the request to the community as it has been presented to the individuals. There must be room at such a meeting for an interchange of questions, information and opinion. Vital, too, is the expression by individuals who have already made their contributions saying why they have made the kind of gifts that they have, or an announcement of these gifts. The interaction of the standard gift setting, the exchange of information, the authenticity of the presentation, will establish the credibility with the leaders of the community at the quota meeting.

Once this process is completed through the usual means of publicity meetings, etc. this credibility will sweep through the community. There are elements that can be worked into the situation. For example, there are Russian refugees or Iraqi refugees who can be brought into the solicitations or the quota setting meeting to help establish credibility. This general process can be applied to almost every phase of the campaign and might be particularly important in the training of workers.

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The dynamic process in training workers is geared toward establishing a conviction of needs in the workers themselves. Whatever the process of worker training may be, it should always have as one element not merely a review of technique but placing a conviction in the workers—that what they are soliciting for has the highest credibility and validity.

Should a community desire, they can go beyond the quota meeting to the Annual Meeting. The program presented to the community should place before them a review of all that has been accomplished so far, what the needs are as presented by Israelis, refugees, and others; the goal established at the quota meeting; the initial response in giving to back up this goal, then some course of action by the Annual Meeting to accept the goal and fulfill it.

Perhaps the very first step if we were to backtrack in our discussion is our own conviction of the credibility of the needs. We must satisfy ourselves that 1972 is truly the crucial year. Sometimes conviction is gained by understanding what others are exposed to; what Israel really feels. Can we understand what it is for Israel to be surrounded by a sea of Arabs? Can we understand how Israelis felt when they heard that their enemies who assassinated the Prime Minister of King Hussein drank his blood? "It is this identification with the Israelis and the refugees that is the goal of true credibility."

THE SOCIAL DYNAMICS OF SOLICITATION

I	<u>Introduction</u>	Solicitation - art or science? The Practice of Solicitation Function of Solicitation in the Fund-Raising Process	<u>3 hours</u>
II	<u>The Prospect</u>	Typology Needs, Motives, Satisfaction Personal Field Theory	<u>2 hours</u>
III	<u>The Solicitor</u>	Homework Personality interaction Aggression, Regression, Compensation, Sublimation	<u>2 hours</u>
IV	<u>The Soliciting Process</u>	(1) Preparation	<u>3 hours</u>
V	<u>Stages</u>	(2) Encounter	
		(3) Presentation	
		(4) Struggle	
		(5) Closing	
V	<u>Exercises</u>	A. Discussion Groups - Based on Case presentation (Before & After Film)	<u>2 hours</u>
		B. Role playing based on Case Film (to be performed in small groups)	<u>6 hours</u>
VI	<u>Closing Session</u>	General Brain Storming for new ideas	<u>2 hours</u>
		Total	<u>20 hours</u>

TRAINING AIDS NEEDED:

- | | |
|---|------------|
| (1) Before-after Film | 12 minutes |
| (2) Case studies Film | 12 minutes |
| (3) Texts for above cases | |
| (4) Transcripts of theoretical lectures | |

Proposal For

Design Of A Worker-Training Program



EDUCATIONAL SYSTEMS & DESIGNS, INC.

21 Charles Street

Westport, Connecticut 06880

11 June 1971

PROPOSAL FOR
DESIGN OF A WORKER-TRAINING PROGRAM
UNITED JEWISH APPEAL

Educational Systems & Designs, Inc. (ESD) proposes herein to design a worker-training program suitable for the training of solicitors throughout the nation. This proposal briefly sets forth the:

underlying concepts,
learning objectives,
program specifications,
general approach,
qualifications of ESD, and
development steps and costs.

A. Underlying Concepts

The effectiveness of UJA depends largely upon the effectiveness of its lay workers in Federated and non-Federated communities. These workers receive periodic briefings from UJA and Federated staffs. There have been limited means thus far, however, for reaching the bulk of the workers through any planned training program. The film "An Act of Kindness" represents one effort in this direction.

Any training program which is designed must recognize differences which exist among donor populations. Thus, the distribution of wealth varies from one community to another. In some communities people hold much of their wealth in "paper" in contrast to communities where assets are much more "liquid." Some communities are closely knit and can rely on group pressure to extract donations in contrast to communities where people are not so intimately related. The extent of geographical dispersion is another factor

which differentiates communities. Differences such as these have a bearing upon the campaign strategies which communities employ.

Despite these differences, however, the similarities among communities in the basic ingredients of fund raising are probably far greater than the dissimilarities. The similarities relate not so much to campaign strategies; rather they relate to the one-on-one relationship between the solicitor and the donor. And these similarities prevail whether the worker is soliciting a \$100,000 donor, a \$10,000 donor, a \$1,000 donor, or a \$100 donor.

Among the universals with which probably every worker should be equipped are the following:

1. An Understanding of the Product.

Every worker should understand and be able to discuss the programs to which the donations will be devoted - Israeli programs, immigration into Israel, local community activities such as hospitals and education, and national efforts such as B'Nai B'rith and the American Jewish Committee.

2. The Capacity to Know What to Ask for.

Aside from the fact that each prospect should be rated before the worker calls upon him, the worker should be able to know his prospect sufficiently to be able to gauge his potential contribution. This calls for an understanding of the donor's economic position, his interests, and his involvement in community and in Jewish activities.

3. The Ability to "Sell."

A third element which workers need is the ability to sell person-to-person. This is compounded of several skills. Among the important ones are:

- a) The capacity to adapt. There is no one right way of soliciting which applies to all situations. The worker must be able to modify his approach depending upon the circumstances.
- b) The ability to recognize what motivates a prospect. Motivations change. Although the defense of Israel was an important motivation in recent years, immigration is probably more important today. But the appeals will differ from one prospect to another.
- c) The capacity to "close." This is important in all selling situations and it requires a sensitivity on the part of the worker.

4. The Capacity to Avoid Taking "Yes" for an Answer Prematurely.

A common error among workers is the premature acceptance of a donor's pledge which exceeds the previous year's donation -- when the pledge falls short of the donor's rating.

5. A Feeling of Responsibility for and Competence in Soliciting.

Traditionally, the biggest single problem in fund raising efforts has been the fund raiser's attitude about

what he is doing and the development of appropriate aggressiveness in getting it done. There is, for example, a certain comfort in talking to a person by phone or sending written requests and thereby avoiding face-to-face contact. Yet, in the majority of cases, a face-to-face discussion, when reasonably handled, will be more productive than a phone or written solicitation. Also, the worker must feel that he has a "right" and/or a responsibility to approach and engage with the giver in a dialogue. Furthermore, he must feel he has the capacity to cope with any hard core resistance that is raised.

When the solicitor feels he has a right or responsibility to act, to be appropriately aggressive, when he feels competent to handle some of the minor and occasionally strong resistance that might occur, and when he is truly convinced that the face-to-face contact is appropriate, it can be anticipated that effectiveness will go up.

These are the universals which any worker-training program should consider. The emphasis given to each one in the proposed program will have to be worked out with UJA staff. However, the existence of these universals suggests the learning objectives towards which the program should be directed.

B. Learning Objectives

Without expounding on educational theory, we can say that learning will have to proceed on three levels, each of which is supportive to the others.

1. Cognitive (knowing what to do)

2. Skill (being able to do it)
3. Affective (having the motivation and commitment to do it)

Our approach is to define each of the three components of learning as it relates to specific learning objectives. The objectives suggested below are presented for purposes of illustration -- they will have to be more carefully defined subsequently in consultation with UJA staff. Typical of the objectives that might be set for this program are the following:

1. Participants will make face-to-face calls.
2. Participants will have basic information about why givers should give.
3. Participants will reach joint commitment about basic solicitation requirements and methods.
4. Participants will feel confident about their capacity to perform as solicitors.

In part, these goals can be achieved through positive planning, through inspirational inputs, and through the enthusiasm of the leaders. But they can be achieved equally or more effectively through a training process which actively engages the learner.

Thus, telling people to make face-to-face contact is not enough to stop them from using the telephone. Getting them involved in making a personal commitment to themselves and to others face-to-face has much greater impact. Supporting that commitment with the basic skills required to execute it greatly increases the likelihood of improved results.

Furthermore, simply having people see a film or role play of some situation is not enough. They must participate in carefully programmed, small-group experiences which surface resistances and help the learner to explore how to cope with them.

ESD's field of expertise lies in motivation and in learning which builds the confidence of the learner rather than in instruction which simply tells him what to do. The sections which follow reflect our convictions in this area.

C. Program Specifications

The program which ESD has in mind will aim to satisfy the following criteria:

1. It will result in learning as described in the preceding section.
2. It will engage active and meaningful participant involvement as the most effective approach to such learning.
3. It will provide informational and conceptual inputs followed by an opportunity for participants to explore their application.
4. It will build not only specific knowledge but also -- to the extent that time permits -- skills and feelings needed to use this knowledge when soliciting.
5. It will lend itself to presentation in the field by individuals not specially trained as trainers.
6. It will allow for presentation within a time period of approximately two hours, although follow-up activities,

both individual and group, might form an additional optional component of the program.

7. It will be suitable for groups which range in size from about 15 persons to 150.

D. General Approach

ESD programs employ an instrumented approach to obtain learner involvement and predictability of learning results. In this program, which will be developed totally for the UJA, this means that the following materials will be prepared.

1. A color film of 15 to 25 minutes in length. This may be shown in two segments, one at the beginning of a session and one about half way through the session. (This will depend upon the training design.) The film will provide the bulk of the informational and conceptual inputs needed for the two-hour session.
2. A workbook for each participant. This will contain briefings for activities in which participants will be asked to engage during the session -- such as discussion, role-playing, and simulated soliciting. The workbook will also contain suggestions for supplementary activities for each individual as follow-up and as a means of checking on his performance as he solicits.
3. A discussion leader guide for the coordinators of the sessions. These will provide clear and simple information about the goals and rationale of the various activities and about the procedures to be followed.
4. Optionally, similar printed materials and possibly a cassette recording will be provided as the basis for

a second session should the workers in a community wish to engage in a follow-up meeting, compare application experiences, and further sharpen their skills.

E. ESD Qualifications

ESD is a consulting firm which has extensive experience in designing training programs for large populations. Its staff combines backgrounds and capacities in the behavioral sciences and the management sciences, both of which have application in this program.

It is relevant to note these experiences and capacities:

1. ESD has developed instrumented courses which have been offered to thousands of individuals in diverse organizations -- private businesses, government agencies, and non-profit organizations.
2. Most of these courses involve films, workbooks, and leader guides and one in particular aims to improve communication skills. Its content focuses on various psychological and motivational aspects, especially the exercise of interpersonal influence.
3. Another program has been designed to train salesmen of one of the country's leading consumer goods companies. This program links the use of films and instrumented training materials.
4. ESD's facilities include a very well equipped filming studio and staff to permit in-house filming.

Typical films and program materials will be provided on request for inspection. References will also be provided if desired.

F. Development Steps & Costs

The following steps will be undertaken to design and develop all program materials:

1. We will have to conduct some initial research to clarify the learning objectives, identify the specific content which should be treated, and determine methods of treatment. These will be reviewed with UJA staff prior to step #2.
2. A pilot film script and workbook will be prepared and reviewed with UJA staff.
3. A film and workbook will be produced suitable for conduct of a worker-training session.
4. These materials will be tested and modified based upon the experience. ESD staff will be present for the testing.
5. A second pilot session will be conducted with ESD staff present and further materials modifications will be made as deemed necessary by ESD and UJA staff.
6. A leader's guide will be prepared to accord with the finalized design.
7. ESD staff will observe a third session which will be totally in the hands of a Federated staff, as a further check on the design and on the adequacy of the leader's guide.

It is our intention to complete these steps by November 1, although our capacity to do this will depend in part upon when approval of this proposal can be forthcoming.

Materials for the optional follow-up session may have to be developed subsequently and should certainly await reactions to the first pilot session. However, their design can be roughed out during steps #1 and #2 above for consideration by UJA.

It is difficult to be precise regarding costs given some of the unknowns -- the length of the film; filming requirements such as animation, split screen, special locations; art work, layout, and printing requirements. ESD's pricing usually involves a fixed fee to cover out-of-pocket costs plus a per capita fee to amortize overhead, provide profit, and share the risk. The mechanics for handling this may make it preferable for UJA to opt for a fixed fee. Accordingly, we propose two alternative pricing arrangements.

Alternative #1:

That UJA pay a flat fee of \$45,000, plus or minus 15 percent, to cover design, development, and testing of the film, workbook, and leader guide for the two-hour session. This will cover all expenses incurred by ESD for the seven steps enumerated above. Additionally, UJA will have to cover expenses for artwork, layout, and printing of the workbooks and leader guides and for additional copies of the film.

If supplementary materials, i.e., workbooks, leader guides, cassettes, are desired for an optional follow-up session of no more than two hours' duration, these will be provided at a cost of \$18,000, plus or minus 10 percent, exclusive of all reproduction costs to provide multiple copies.

Alternative #2:

That UJA pay a flat fee of \$23,000, plus or minus 15 percent, to cover out-of-pocket costs for design, development, and

testing of the film, workbook, and leader guide for the two-hour session. Additionally, to the extent that UJA trains more than 3,000 workers, it will pay to ESD \$2.25 for each such worker who participates in the session. Also, UJA will pay out-of-pocket expenses for artwork, layout, and printing of the workbooks and leader guides and for additional copies of the film.

If supplementary materials are desired for an optional follow-up session of no more than two hours' duration, these will be provided at a cost of \$9,000, plus or minus 10 percent. Additionally, to the extent that UJA trains more than 2,000 workers using this second program, it will pay to ESD \$1.60 for each such worker who participates in the session. Also, UJA will pay out-of-pocket expenses for artwork, layout and printing of the workbooks and leader guides and for multiple copies of cassette tapes, if they are used.



HAF
cc: MB
RS

Most basic item for 1972:

SET UP ~~3-4 HOUR~~ ^{3-4 HOUR} WORKSHOPS

FOR KEY SOLICITORS IN ALL
COMMUNITIES DESIRING THEM.

START WITH TOP 50. ASK

WHO WANTS THEM. SCHEDULE
DURING MONTHS NOVEMBER-DECEMBER.

AGENDA FOR ^{WORKSHOP} ~~PROGRAM~~ invitees

- LOCAL SOLICITORS
LOCAL EXEC
~~LOCAL~~ NATIONAL WJA LL + PROFESSIONAL *
1. ~~SHOW~~ SHOW HAF FILM * - 20 min.
 2. DISCUSS RATING - HOW TO DO IT
 3. ANALYZE SPECIFIC NUMBER OF
CARDS TO BE COVERED BY INDIVIDUAL ^{SOLICITOR} ^
 4. ~~DISCUSS~~ DISCUSS USE OF OUTSIDERS TO HELP
 5. DISCUSS REPEAT VISITS - NOT CLOSING FAST
 6. DISCUSS VALUE OF SMALL PARLOR MEETINGS
 7. QUESTION OF WHETHER LARGE MEETING IS ^{NECESSARY} ^

* THIS FILM WOULD HAVE TO BE ^{ESPECIALLY} MADE. SHOULD
DISCUSS NOW ITS FORM + CONTENT. - ^ 16 mm or
VIDEOTAPE; SPEECH OR DIALOGUE

the jewish agency for israel
institute for fund raising



AMERICAN JEWISH
ARCHIVES

LECTURES ON FUND-RAISING

GIVEN BY RABBI H. A. FRIEDMAN

אגודה יעקב ישראל

Lecture by Rabbi Herbert A. Friedman
December 17, 1972
(Substantially edited from tapes)

YOUNG LEADERSHIP - I

Recruitment and Organization

Young Leadership is a very specific idea, meaning the creation of a group of leadership at a reasonably young age, age 30, who will become the leadership of the whole campaign for the whole city, or the whole country, by the time they are 40.

You must create and train and motivate a group of men before you give them the controls. Young Leadership requires a revolution in every community. In some places they use "young leadership" to mean getting a bigger gift out of somebody; or it simply means that they want to bring in one young man as a symbol that not everybody on the campaign committee is 80 years old.

That is not what I mean by Young Leadership. I created it in the United States. It is beginning to take hold in England. It does not really exist anywhere else yet.

Young Leadership means -

- 1) You have to organize a group of people.
- 2) After you organize them, you have to motivate and inspire them.
- 3) You have to explain to them very carefully the whole manner in which the money works. The young ones today have to know how the money - which they raise - works; how it is spent. And you have to know it too.
- 4) How you teach them is a very, very special business.
- 5) How do you use them once you motivate and teach them? What do you do with them?

To organize a Young Leadership Movement means, first of all, to find and recruit people. For one whole year before I called the first Young Leadership Conference in the United States in September-October, 1961, I carried a tiny notebook in my pocket every place I went -- every city, every state, every committee meeting. If I saw a young man -- 25, 28, 30 -- I would go up to him, ask him his name and address, and I wrote it down. If I came into a meeting where people were talking and I heard one guy talking, who had a nice young face and a good clear head, I put him down. I collected about 400 names that year. The criteria was if I saw somebody who was interested in Israel, who was interested in working -- even if he didn't know anything -- if he came to a meeting I asked myself: "What is motivating this young fellow? Something is inside of him. He must be concerned about Israel. He cares.

He must feel himself to be some kind of a Jew different from all the other boys in his generation." In short, if he showed enough interest to come, that I showed enough interest in him to investigate him further.

After you find and recruit them, THE SECOND THING YOU DO IS MOLD THEM INTO A UNIT. We created what we called a "Cabinet." It's a very good name and to invite a boy to join the Cabinet of the Young Leadership Movement is no small thing. It is a very great honor; it puts him into a very important position, makes him feel good, and he works like hell. They have their own Retreats; they have weekend Seminars; they make their own plans for their trips to Israel; they make up their own itinerary. They have a feeling that they are a unit.

Two years ago I went to the Young Leadership Cabinet and said: "Gentlemen, you have on your Cabinet now 200 men all over the United States. Take these 200 men, get each one to give five working days, or two working days, or three working days of his time to solicit five or eight people or ten people each. Multiply these several thousand people you can see who are now giving \$1,000 and \$2,000, and bring them up to \$5,000, \$6,000, \$7,000, \$10,000.

They accepted the responsibility. They took one of the "old" Young Leadership chairmen -- he's 41 or 42 -- and appointed him to be the chairman of this entire project. He is not the chairman of Young Leadership -- he has already graduated out. But he uses this Cabinet as a working unit for a special purpose, so they have the feeling that they are not just individual boys whom you have recruited -- but that one day they, too, are going to be leaders.

You must give them "esprit de corps," you must give them a feeling that they are different from everybody else, and better than everybody else, and that the future is in their hands -- and if they will do a good job they can have the future.

That brings us to the next point, of creating the revolution to make room for them at the top. You cannot only give them promises; you cannot only train them and say, "I want you to be a leader, and I want you to become the chairman," you must do it. Don't throw out the old ones until you have some new ones ready to put in. But all the time you are molding them into a unit you are telling them that they are a better group -- and they are.

They have proven this with their own money. Getting money from them is the easiest thing in the world. This Cabinet of Young Leadership -- these 200 young men -- is now way over \$2 or \$2-1/2 million. So it means that there is already an average of \$10,000 each from guys who are in their late 20's, early 30's.

So when you instill in them this "esprit de corps," and you tell them and teach them and inspire them, you cannot say to them: "excuse me, but I really don't know what to do with you now because the Chairman is still sitting

there, and the Vice-Chairman, and....."

England is much more advanced with this concept than the United States. I have tried and have failed to put into the chairmanship of the U.J.A. nationally a whole bunch of boys who are now in their early 40's. You, as a professional person have got to find room at the top for your Young Leadership boys.

I failed with the National leadership of the U.J.A., but not locally. Locally among all the cities in the United States I believe there are now 57 chairmen from the Young Leadership Cabinet whose cities each raise a few million dollars. On the local level it is a success -- we made room at the top.

Don't start something you can't finish. Don't start a Young Leadership Movement until you know that you can do this, because if you do not offer them a place to go, and make room for them -- there is no sense in starting.

For better or for worse some of your young men have to fall by the wayside, and some have to be moved aside. But you have to control it so that the disappointments and the frustrations do not take a destructive form. And the way you do that is to figure, if you can, a way to channel the man, divert him, find something else for him. It may not be at the top, but it is enough to satisfy his ego and his self-esteem.

We have had about nine National Chairmen of the Young Leadership Movement over 10 or 11 years. Not one of them yet -- although four or five of them were qualified -- has become the General Chairman of the whole campaign. Several of them, however, have become chairmen of the campaign in very large cities, raising 10 and 15 million. It is a big job and it gives very big ego fulfillment. Half a dozen of them sit on the National Executive.

They are not yet THE Chairman, but they are within breathing distance of it. If six of them are on the National Executive, ONE of them is going to be the General Chairman some day. The others won't make it. What you have to do is make one of them the National Chairman of Cash Collections; one of them National Chairman of Problem Communities, and so on. Create new positions.

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- Lecture by Rabbi Herbert A. Friedman
December 12, 1972
(Substantially edited from tapes)

YOUNG LEADERSHIP - II

Motivation

If you want to give a man something to believe in, to inspire him, you have to give him something so deep and so true that he doesn't argue with you -- he feels it. There is nothing more important you can do for a young Jew than to show him how he can work to keep the Jewish people alive.

Twenty-eight per cent of all Nobel Prize winners are Jewish. The Jews are the most fantastic people on earth. The goyim don't understand us, don't like us -- because in scientific terms we are a phenomenon, and this is something strange and queer. But we are also the most creative people on this earth, and to keep this people alive so that they can make -- instead of 28 per cent Nobel Prize winners -- 48 per cent, to keep this people alive is the greatest mission you can undertake. There is nothing bigger.

"How can I do this," he will say. "I am only one man." By keeping Israel alive, you keep the whole Jewish people alive. One man does it! Each man with his own little pledge becomes many. A few thousand people working hard as hell keep Israel alive, and keep the whole Jewish people alive.

And in this whole structure, the part that he can play is unbelievable. The part which any one of you can play -- if you can make ONE leader -- can have an unbelievably strong effect. But you cannot make anyone into a leader unless you touch him so deeply -- and you can touch him deeply enough with the question of life or death only. Nothing else.

You have to find the way to say it, the example of doing it, demonstrating it, of putting this young boy through many experiences to bring him to this conclusion.

This is how you will build your leadership. Don't try to build leadership only on the basis of teaching him the business, the art of fund-raising. First you have to teach him WHY. Then you can teach him how, and with what. It is not enough to say we need money to bring in fifty thousand Russian Jews. Why are fifty thousand Russian Jews so important?

It is important to me that YOU understand that sincerity and conviction have to come across. If you have that feeling inside yourself, you will transmit it to him; and if you transmit it to him he will give you fifty years of his life. Inspire him with this and you have given him material that will last him for a lifetime.

You are looking for that boy in whom you can touch that one germ of idealism, and if you nourish it and it grows, it is like a very strong tree that you can lean on. If you have five, ten, twenty, thirty like that to depend on -- you have an army in your hand. Then you are making a contribution, not just in terms of money. You are making a contribution in terms of manpower.

TO RAISE PEOPLE IS MORE IMPORTANT THAN TO RAISE MONEY. If you can raise people, then you are in contact with future generations, because he will teach it to his children after you are dead. Raise people and you will raise more money. Begin with yourself -- train yourself.

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We are talking about how to motivate and inspire a young man -- in his early thirties -- to become a lifetime worker. Unless you succeed in motivating and inspiring them at that age you don't have them. You have to make it clear to them only two things, and if you do then you have dedicated and devoted converts who will never desert or drop out.

If you convince them of these two things, then you give each one of them a whole new philosophy of their own lives. But unless they believe these two things they will never be the kind of solicitors you need, or the kind of new leaders you always need to develop.

You must make this young man understand how close the Jewish people came to extinction. I do not mean only the Jews who were killed in the camps. You, yourself, must understand how close to death the whole Jewish people still are. I cannot understand why our people still don't realize what has really happened to them.

When one-third of the Jewish people in the world were physically destroyed, what was the reaction of the other two thirds? The five or five-and-a-half million Jews in America were totally paralyzed. The biggest, richest and most powerful group of Jews failed. They didn't know what to do, and in the end they did nothing.

Only one leader tried to stir them into action -- Rabbi Stephen Wise. Most tragically, the Jews of America did nothing because they didn't believe there was any danger, didn't see the danger, didn't understand the danger. And the cries of the one man who tried to warn them fell on deaf ears.

1938 -- Munich. 1939 -- war. By 1945 at least some of the Jews of America knew how much they had failed. If I had written an historical analysis and prediction in 1945, I would have given the Jewish community of America exactly two generations more of life, and by the year 2000 -- overwhelmed by guilt and self-destructiveness -- I would have expected it to have disappeared.

Were there not now an Israel to fight for, to believe in, I believe

unequivocally that by now the Jews of America would have been morally bankrupt, and totally destroyed spiritually.

The Jews of Russia were weak, not paralyzed as the Americans were -- but simply defeated. The Russian Jewish community was badly wounded, with a million dead and no organization. The Communist system allowed no central organization of Jewish communities.

With American Jewry inactive and Russian Jewry cut off, what was left of the Jewish world? Western Europe? North Africa where a million Jews lived in poverty and ignorance, for centuries removed from the mainstream of Jewish life and history? The million in Latin America? There was nothing!

Therefore, we saw not only the physical death of six million Jews, but also the near death psychologically of the other twelve million. You had a surviving nucleus of Jews, but it was dormant. Never in all our history did we stand in greater danger of absolute disappearance as a people; not even when Babylon and Rome conquered and dispersed us did we face such a prospect.

But in 1945 this danger was real: one-third dead; two-thirds about to disappear. You must make that clear, and you must believe it yourself. You have to go back to the three or four places on this earth where you can see it -- to Auschwitz, to Dachau. You, personally, must go. You cannot ever understand it until you see it yourself. You must understand that in 1945 we ALL almost died as a people, and you must brand your young man with this.

If you understand the danger of how the Jewish people almost died, then concurrently you must see, logically and realistically, that Israel is the only thing that has preserved the Jewish people as a people -- by restoring to them the meaning of their lives -- because ISRAEL IS OUR FIGHT TO STAY ALIVE.

You must understand and explain the meaning of history to your people; the why, the mystique, of the coming of the State of Israel in 1948. We prayed for this two thousand years. Why now? I believe very much that the mystique of history which brought us to that pinpoint in time gave us this chance at the very moment we were about to die. We fought to live. We understood that we, the whole Jewish nation, were fighting to stay alive, not just to build a state.

I think the State of Israel came into being because the Jewish people made one last effort to stay alive. Had they not succeeded, the 600,000 Jews in Israel, and the 12 million Jews outside would have been obliterated. We as a people would have been finished, and the pages of our history closed in about the year 2000.

When you realize that this was the last chance, then something inside of you moves, just as something inside of the Jews of Israel moved -- in 1948 -- fantastic courage. Perhaps it was foolish to declare the State of Israel in 1948, without weapons, without knowing what the Arabs or the big powers would do. But at that point, finally, facing death, the Jews of the world suddenly understood.

We will probably have more war, more bloodshed, more wasted money on jets and weapons -- it is not over. But I don't think we are in danger of dying as a people as we were then. They can hurt us, make us cry. But we no longer stand poised at the moment of historical death.

The Jewish people are alive, and because Israel has restored that life she is now the center of Jewish survival for the whole Jewish world. This is your central point -- ISRAEL IS THE CENTER. If anyone tries to tell you that the six million Jews of America can survive as a people without Israel, they are wrong. And if three million Russian Jews try to tell you that they kept Judaism alive in their hearts these 50 years in spite of the Soviet regime, and are therefore strong and powerful as Jews -- this, too, is wrong.

We in Israel say that Israel is the source of their inspiration. Talk to the Russian Olim and ask them what brought them back to a sense of Jewish identity. They will be the first ones to say, "The Six-Day War," what they heard on the radio, the pride they felt.

A recent visitor to Moscow gave a young Russian Jewish activist an Israeli hundred pound note, and said: "This is a Herzl." And the Russian youth, who had been arrested together with his family by the police, a boy who had gone through hell, answered: "Who is Herzl?"

It isn't Herzl's Zionism that brings them to Israel -- it is pride in this country!

There is no possibility of independent or creative Jewish life flowering any place in this world without Israel. Israel meant life in 1945 and kept the Jewish people from dying. Israel is the center of the survival of Jewish life, physically and spiritually from now on.

I am not saying that American or Australian or Swiss community life is no good. But they are not the center. There is nothing without the center. From the center is drawn inspiration. From the center is drawn identity.

Do you really know what you are doing when you go out to build strong organizations or to raise money? You are not just fund-raising. I hope you realize that you are helping those very communities to stay strong and alive by strengthening their links with the center, which is Israel. You are a liaison officer, a missionary in a sense, and your job is to forge a strong relationship between the Jews of the world and the State of Israel.

Lecture by Rabbi Herbert A. Friedman
January 7, 1973
(Substantially edited from tapes)

YOUNG LEADERSHIP - III

Education

The first topic we discussed on Young Leadership was how to recruit and organize them; the second was motivation and inspiration. Today we will take as our topic -- educate them, explain to them.

Explain 1) how the money is raised; and, 2) how the money is spent.

How the money is raised varies from country to country, so I do not want to get into that here. This is something you have to learn wherever you may be, and teach it to your Young Leadership boys.

How the money is spent has to do with Israel. And here it is the same in every country in the world.

You can, as an example, prepare some statistics which indicate expenses during the Israeli tax years 1967-68, 1970-71, 1972-73 (estimated), and list outlay for defense, immigration and absorption, housing, etc., as well as tax revenue from within Israel. Also list Israeli foreign currency debts in dollars, and local currency debt in pounds. Run the figures for each heading across for the three fiscal periods you are using as samples.

The explanation you take from this is very simple -- defense costs have jumped higher than they were during the Six-Day War; aliyah costs are way up; the Israeli is paying much more taxes and more in debt. So -- your taxes have to go up!

This is very simple, good, no argument. This tells you what the Israeli Jews are doing. So what should you Jews do? Try to keep it as simple as possible. The simpler, the better.

If they ask, "Is all that being spent on aliyah?" tell them, "no, that is only what the Jewish Agency is spending -- a small part of the money. This doesn't tell you what the Israeli government is spending -- five times that much, and it comes from taxes from the people."

The important thing to show is that costs are going up, and that the Israeli does his best, but it is not enough. The government borrows more money and goes deeper into debt. Therefore, the Jews on the outside must increase their share also. This is intended to show how the money is spent. For the Young Leadership men these are not the campaign arguments -- these are the true figures for defense and social welfare costs of the Jewish Agency which I want them to know.

This is what the young businessmen in the Young Leadership want to know -- the details of how the money they contribute and help to raise is spent. The older contributor doesn't care as much -- you don't need this sheet for solicitation because there are too many figures on it.

But for training your Young Leadership you have to give them a very clear picture of what is happening on the inside.

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Lecture by Rabbi Herbert A. Friedman
January 14, 1973
(Substantially edited from tapes)

YOUNG LEADERSHIP- IV

Education

The most important thing these young people want after you inspire them, after you motivate them, and after you give them the facts, is for you to teach them, because you are a leader of the modern young generation and not someone who lives by the emotions of their fathers and grandfathers, who do not know much of the facts. They know mostly the emotions.

The young generation wants to know in much greater detail what the background of the whole thing is. You have to teach them as though you were giving them a university degree, and there are five ways which I have found can best accomplish this process.

1) A seminar -- He has to give you one day. He comes in the morning and he can go home in the late afternoon. I find that a seminar is always best if you organize it on one subject. Don't try to teach him too many things at one time. You can have a seminar series, one a month for nine months. This is one year's work.

Pick nine important subjects for him to learn and then he will be very well informed. Whatever you teach them, be honest with them. Talk to them straight. They must know the truth about life here in this country, and then they will like us better because they will understand us more.

Arrange your seminars on a local or regional basis if necessary. Keep a tape recorder going. Edit the material down and mail it to them afterwards.

If you think you know a subject really well, if you feel that you have the qualifications and the background and the knowledge, then you do the teaching yourself.

In Young Leadership teaching today they are going more and more with outside experts -- professors from universities. It is all very good. But you must remember that this is teaching -- not a speech. Teaching has to have plenty of time for questions and answers. If it gets boring then stop at the end of one subject. If you are finished in two hours, done -- go home; even if you say the seminar is going to last from 9 a.m. until 4 p.m. if you finish at 1 in the afternoon -- go home. Don't stay on until 4.

I believe in going into subjects in depth. I would not deal with subjects that only take one or two hours. You don't need to take a whole day seminar for that. A seminar today, if it is 4, 6, 8 hours it has to be on a big subject.

2) Book of the Month -- It is a very good idea for you to send your Young Leadership boys a book on some subject connected with Israel every month. You can also make up a bibliography. You pay for it, this is your gift to them, and they begin to collect the books on their shelves. Pretty soon they have a nice library of forty or fifty books about Israel. This is something permanent that they will have for the rest of their lives.

Send them everything, from Herzl to Ben Gurion. There are plenty of very good books on Israel, serious books on all aspects of Israeli life.

3) Weekend Retreat --- Once a year you bring your whole Young Leadership together, thirty, forty or fifty people, whatever you have, for a weekend. You plan this for months in advance. They come Friday afternoon and you begin your first session Friday night. You can have sessions Friday night, Saturday morning, afternoon and evening, and Sunday morning. You can have five sessions. Sunday afternoon they already have to begin to travel to go home.

Pick five subjects and give them a big teaching weekend which should give them information and inspiration for a whole year's work. On a typical weekend retreat for the Young Leadership Cabinet, for one session we would always invite the Israeli Ambassador. It does not matter where we have the Retreat, he comes from Washington and he gives two hours.

Then for one or two sessions, depending on the subject, you the professional take over.

Also bring in some of the staff of the UJA; the Directors of the Field Department, of the Campaign Department, Personnel, to talk on specific problems of next year's campaign.

Take a few hours for the factual business of a campaign, on the specifics of the budget, what is the campaign slogan, how are we going to make next year's campaign, etc. That is one session.

Sometimes they want another academic session, so we invite a professor to come who gives them something about the philosophy of Jewish survival. It is a very deep subject and he gives them a lecture for a few hours with questions afterwards.

These weekend retreats are very deep and very serious. We make a kiddush on Friday night. The mood is nice. The boys come from all over the United States at their own expense. At one time we invited a group from England to one of these Retreats and they subsequently started their Young Leadership Movement in England based upon ours. They flew from London to New York at their own expense. I know they can afford it, but the most important thing is that they had the motivation.

Usually the wives do not come to the Retreat, but if they do they are welcome. It is out in the country away from the city, from the distractions, from the telephones. You have nice green grass outside, and

when you break after three or four hours of hard work you need this. Do you want to go outside in the city and stand on the pavement, with the traffic and the smells.....No. Grass, trees, sky. Best to go away some place.

4) You must begin from the beginning with the Young Leadership to tell them that you cannot teach them about Israel in the abstract. They must be prepared to come to Israel.

To come to Israel is, in itself, a teaching process. Just as once a year they must come to a weekend Retreat, so once a year they must come on a mission to Israel --- MUST. If they want to be the leadership they have to learn every year what is happening in Israel. From a practical point of view, the whole leadership of about 200 people (that is the number of top people in the United States) does not come every year. We say they should come every year, but actually they come at least once in every two years. Some of them come twice a year. They like it and can afford to take the time away from the business, wife and children. But all of them understand that they must come here at least once a year, and if they cannot make it that often, the minimum is once in two years. Most come on a mission once every year, bringing other people who are not in the Cabinet.

There are sometimes three or four Young Leadership missions a year coming to Israel. Each one has a hundred people. Perhaps 20, 30 or 40 of these might be Cabinet members, and the rest are people they are bringing into the work. Out of a Cabinet of 200, 30 or 50 come with each mission, along with 200 or 300 hundred others during the year. Many of them are coming now, not on missions, but by themselves, with their wives and children. They are coming with their families, and renting apartments for a few months at a time. They want to spend time here themselves. That is wonderful. That is a very important part of the teaching process.

None of our Young Leadership will be like the older ones who love Israel from a distance, but never came here -- or did so once in ten years. The young guys, if you get them deep into something, they want to become part of it and to be with it.

5) Conferences -- If the general UJA has a conference every year in December with several thousand people, the Young Leadership Cabinet will organize as many as possible of their own boys to come to that conference, and on the side they will have their own meetings. This ties them into the big movement, so that they are not something separate, but of course in a way they are something separate and they feel it. We want to make sure they are connected and separate at the same time.

Once or twice during the year, when there is a big UJA function, their leadership also takes part.

Every city is beginning to develop its own Young Leadership group. Slowly but surely, the movement is growing and growing. This is the takeover

process. I am sure that if there now exists a trained and educated leadership for the American Jewish communities of the next generation -- it is because of the years of hard work -- from 1961 until 1971 -- which have developed the YOUNG LEADERSHIP MOVEMENT.

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Lecture by Rabbi Herbert A. Friedman
December 17, 1972
(Substantially edited from tapes)

RATING

THE BIG GIFTS ARE THE MOST IMPORTANT PART OF THE WHOLE CAMPAIGN. EVERYTHING ELSE IS SECONDARY.

You have to know where to put your emphasis. You have only a certain amount of time and time is your enemy. When you lose time, you lose money; you have to decide where to put your time and how your time will make the most money. And the most money is made in the BIG GIFTS part of the campaign.

The first thing you have to find out is: WHAT IS THE RELATIVE IMPORTANCE OF THE BIG GIFTS IN YOUR CAMPAIGN? The key word here is "relative." If you go to a campaign where \$5 million is raised, what proportion of that money came from the big gifts? What is the relative weight, relative share? No matter where you go you will find that the share of the big gifts in relation to the total is enormous -- but so enormous that I could show you some campaigns where 80% of the money comes from the big gifts. And all the rest of the campaign -- thousands and thousands of contributions -- is only 20% of the total.

If you are going to work on a middle range, or lower range, or mass campaign, then that is what you have to concentrate on. But if you are going to work anywhere near the top of the campaign you will have to concentrate on the big gifts. Once you know what the relative importance of the big gifts are -- 40% of the campaign, 50%, 80% -- this will give you a frame within which to know how to spend your time.

The second thing you have to know is WHAT IS A BIG GIFT? The definition of a big gift is different in every campaign, but I want to give you a standard which I think is correct for any country in the world.

Many years ago I set the definition of a big gift in the United States at \$10,000 and over. In other countries in the world \$10,000 is too high. In some countries the big gift is \$5,000 and over; in other countries \$2,000 and over. But now the definition of a big gift in the United States is \$20,000 and over. The definition of a big gift in England has been raised to £12,000. I say very good, because the higher the standards go, the more money we will make. Rule number one in this business is "chutzpah." The more you ask for the more you will get.

Once you look at how much of the campaign is made in the big gifts department, and what is the big gift, then you can make your plans for future expansion. All this you do at your own desk without looking at one human being, without asking any questions about the economy in the country, or the stock market, etc. Don't look for any outside explanations; don't let anybody give you any reasons why it is not possible to raise more money. Sit in your

room the first day at your job, and say:

- 1) How much money did we make last year? (£13 million.)
- 2) What was the percentage that came in big gifts? (60% - £7 or £8 million.)
- 3) What is the definition of a big gift in our country? (£5,000.)

Now the question is, if I now make 13 million, of which 8 million is big gifts, and a big gift is 5,000 -- next year I want to set my target to make, not 13 million, but 17 or 18 million. The percentage which will be brought in by big gifts will probably not increase very much. It may be that big gifts are now bringing in 60%. They will continue to bring in 60%. But 60% of 18 million, not 60% of 13 million. So instead of making 8 million in big gifts now I will have to make 10 or 11 million in big gifts.

How many big gifts did I have last year above 5,000? 450. This year, then, I have to have 600.

This is the mathematics of how you develop the architecture on the first day, build up your building. No one can tell you anything, you know more than anyone on this -- you are the boss!!! If you come in strong and say: "This is our target, and this is what we are going to do, and this is how we are going to do it," that is the whole difference. That is what makes an expert.

Your only question is HOW ARE WE GOING TO MAKE 600 BIG GIFTS INSTEAD OF 450 BIG GIFTS? Suddenly the problem is reduced to finding 150 more people to put into the big gifts.

Where do you look for these 150 people? You look for them in the \$2,000 to \$5,000 group. You pull out all the names of people who are giving in this range and they are your target. In this group you are going to find the 150 whom you are going to bring up into the big gifts range.

This principle applies no matter what numbers you are talking about. In Puerto Rico, for example, you do not have 150 people between 2,000 and 5,000. But the principle is absolutely the same.

We know that the big gifts are the key to the success of the campaign. The defining of the big gifts is also a key to success, because you have to constantly keep upgrading what is a big gift. It cannot remain the same. Any community, whether it keeps its lists with a computer or with a fountain pen, has categories. If they do not change the categories all the time, the campaign is static. You must find ways and means of changing the definition of what is a big gift. You must move it up, up, up.

You change the definition by the manner in which you organize your events. How did we change the definition in the United States from 10,000 to 20,000? We took the October Study Mission -- the big once-a-year study

mission -- and it used to be that everybody who gave \$10,000 received an invitation. When we decided to upgrade it, we sent invitations only to people who give \$20,000. Immediately, this became the new big gift standard. The only people who come on this study mission are people who give at least \$20,000. This has been the definition for three years now.

You have to pick the right moment to upgrade the figure. This will make the group smaller, but then you go below and push people up and fill the category again. You keep taking off the top, filling up from the bottom.

How to do this? We will start by talking about RATING, but I would like to preface the subject as follows:

Everyone who knows Hebrew knows what "nedava" is -- it is a hand-out. If any of you intend to go looking for hand-outs -- don't start, quit now. Look for some other kind of work.

We are not looking for "tsedaka" either, and don't even use that word. There is another word that is out -- "trouma." You are not looking for a donation. A donation is usually a one-time thing, but you are coming back next year, and next year, and next year.

What you are looking for is INCOME TAX. This is a bold, new, revolutionary approach, and I have started to use these words since the Six-Day War.

"Ladies and gentlemen -- nice Jews of the world. I don't give a damn, I do not want your "Nedava," and I don't want your "Tsedaka," and I don't want your "troumot." You are an integral part of the people of Israel. You don't live in the State of Israel, but you are Jews, so you have to pay "missim." This is a tax, and I am your tax collector. I come to you every year, and you have to pay your tax."

We don't have the power of the police, and we don't have the power of the courts, and we don't have the power to jail people, but in our own minds we have to get as close to this approach as possible. We have to believe it ourselves and come in as strong as we can to make THEM believe it.

You represent the Jewish people, you represent the Jewish State, you represent the tax-collecting authority, and you have come to tell them how much their taxes are this year. THAT IS RATING.

RATING IS HOW BIG YOUR TAXES ARE THIS YEAR!!!

I went to England in October for about two weeks and in ten working days I met with 30 committees there. With each one I tried to get across the idea of tax, but they kept saying: "We cannot get that across to our people; our people will resist it; our people will resent it; our people will say nobody can come and put taxes on them because they are English."

My battle with them was to say:

You have to talk to your people, not like Englishmen, but like Jews.

Let's cut out all this nonsense that he is a conservative English gentleman and he will not like this hard, aggressive approach. For God's sake, before he was an Englishman his grandfather came from Vilna. Who is he kidding that he is an Englishman, or a Canadian or Swiss or German? HE IS A JEW.

If you really want to shock him, tell him what his taxes are. Tell him that you want "ma'aser" -- 10% of his whole fortune, because you have a moral, ethical, historical and religious right to come to him and say: "Jew! Pay your tithe!"

But you have to be in a position where the right and the justice and the strength are on your side and he is on the defense. The way to win is to attack. Tell him he has to pay his taxes, then tell him how much. You did not take it out of the air; you did not take it out of your pocket -- you took it out of Jewish tradition and history.

Now say to him -- "Relax. I am not going to ask you for a tenth. You have one million pounds sterling -- really you should give me 100,000. But I know you won't, and I didn't even come to ask you for 100,000. I came to ask for -----."

Now we come to the business of rating. What DID you come to ask for? There is no such thing as a scientific way. This is not a science, and anyone who tries to tell you that it is is kidding you. This is an ART, but every art has rules. A painter goes to art school for ten years to learn the rules, how to mix colors, etc. So this is not science, even though it may sound like science. In reality you are learning an art. And you are trying to learn the RULES of this art. Always remember -- the rules change all the time.

Rating means "a rate, an amount, a sum." Before you go out to ask a man for any money at all, you have to decide how much to ask him for. If you decide correctly, you have a good chance of getting it. If you decide incorrectly, you may look like a fool. You must never look foolish. You must not look ignorant, as though you do not know your business. If you are going to ask for too little you have made a terrible mistake. You lose him. He has no respect for you. You have to be very, very careful -- like in walking a tight-rope -- not to fall off on one side or the other.

I cannot sufficiently stress how important it is to sit down and to rate the man carefully. Don't jump into the campaign until you are ready. Start a month later. But do your homework first, do your preparation first, make your ratings for all of your prospects first. Decide what you want to ask a man for before you go to him.

WHEN IN THE CAMPAIGN SHOULD YOU DO THIS RATING? In theory, you should begin the rating process about one month before you are ready to start asking for the first big gifts. You also have to decide on the length of time of the big gifts phase of your campaign.

In the American campaign let us say September 1st to October 1st is your preparatory period. October 1st starts your big gifts period. You are actually asking for money in October, November, December, January. That is your big gifts phase of the campaign all over the United States. But whatever your big gift phase of your campaign is, a month before that you sit down and start to rate your people. In other words, you assign a number and an amount of money to each name -- the amount of money you are going to ask him for.

This is the most crucial part of the campaign. Here you have to make the right decision.

It is now that all the research you do has to pay off. You have to have a research department where you are constantly up-dating your information about people in the big gifts category. Mr. X is in the big gifts group -- he has given you \$10,000. But your research department sees a notice in the newspapers that he sold a piece of property and made half a million dollars. They take this clipping from the newspaper and put it into Mr. X's file. A card index can do it IF you have a very good system and clerks to keep the index. But I never depend on that. I always prefer a folder, and into this folder I put everything. With a card you are limited in space.

When you do your research well you have to have all the facts, and you have to figure all the possibilities, so if you have everything together on this man you can prepare yourself the day before you go to see him by studying this file. The research goes on twelve months a year, but in the final phase before you start campaigning you review his past giving record and decide how much you are going to ask him for now.

Who actually does this? WHO DECIDES HOW MUCH TO ASK HIM FOR? The rating of the big gifts has to be done by a group of people. Don't let this rating be done by one person -- and don't you do it yourself, although in effect YOU are responsible for putting the number down. It is your rating. You sit with the Rating Committee, but YOU have done all the research because they are not going to do it. You recommend the figure you want. They may say you have misjudged this one -- 40 is not enough, we should ask for 75. Once in a while they will tell you that you are wrong the other way, that you exaggerated, so ask for less. But most of the time they will accept your ratings and if you do not have one -- if you did not do your homework -- you are lost, finished. YOU have to be the power, the engine, the motor, the brain always working behind the scene. And then you have to have a cover, and the cover is this Rating Committee of top leaders with the biggest names. If you have a choice when to use one of your big leaders, take him for a rating session. That is the most important thing he can give you -- your cover.

BEFORE YOUR RATING COMMITTEE STARTS TO RATE OTHERS, THEY MUST RATE THEMSELVES.

They must rate themselves and increase their own ratings, and you tell them very simply: "Gentlemen until you are ready to do that we are not going to start this campaign. There will be no campaign."

No such "self-rating" meetings have ever been held without a "pre-meeting." Before you get your Rating Committee together to rate themselves, you must have a pre-meeting with one or two men from among them who will be your primers. This pre-meeting is private -- between you and them only. You will have to organize it yourself. You will have to find the one or two men in the group who are willing to support you, and who will take the lead when your self-rating meeting gets started. They will be the first to rate themselves; they will get you moving.

HOW MUCH SHOULD YOU RATE A MAN? Two prime factors determine your rating: net worth, and even more important -- income. And here standards vary considerably in different countries, so there is no fixed pattern. You have to determine what the standards of the country are, and then you have to try to raise those standards. This is why I say fund-raising is not a science -- it is an art.

I'll tell you what I think is a good standard. I think that you cannot ask a man who has \$15,000 a year gross income, who has a wife and two children, to give 20% -- that would be \$3,000; not even 10% -- that would be \$1,500; or 5% -- \$750. If he gives you \$500 a year, this is a good deal for you. If we could get this from all the Jews who are earning that kind of money we would have no problems at all.

Now come up. A man who is earning \$50,000 a year is not an exception in the United States. A lawyer who is graduating from law school and is going into a law firm as an apprentice begins at \$17,000 to \$20,000. By the time he is 35 years old he is making, perhaps, \$40,000. Maybe you will get from him 5% (\$2,000). If you get 5% from everyone who is earning \$40,000 we will be very, very happy.

You do not have too much room for expansion here. You do not rate anyone in the \$2,000 - \$3,500 level.

But when he is already earning \$100,000 a year for five years, ten years, then he is beginning to get rich. Once he begins to earn that much he also has a "keren" on the side; stocks, bonds, property, jewelry, etc. Now this is the man! You have to ask him for 20% -- \$20,000. But that is only from his income. Because he also has capital -- his "keren" -- you have to ask him for a bonus from his capital.

The man who is earning \$100,000 gave you \$10,000 last year. This year I am rating him at \$25,000. I want \$20,000 from his income; and \$5,000 from the "keren".

The question inevitably arises of using the goal to determine the rating. And especially here I want to emphasize a great danger to you. Inevitably someone on your Rating Committee is going to say: "Our goal is 40% higher this year, so let's rate the cards 40% higher."

NEVER, NEVER, NEVER use the goal in determining the rating of a man. Do not match the rating to your goal arbitrarily. Rate him lower or rate him higher, but never exactly the percentage increase in the goal. It might be correct to do this for some individuals, but for most people it is not. Never let anybody talk you into making a rating on the basis of the goal -- and they will try!

BEGIN YOUR RATING WORK EARLY. You have the working committee to cover you; you work with the standards to figure out how to raise them; you do not make the mistake of using the goal to rate; then, how do you tell him how much you rate him for?

There are several ways you can do this, and it is hard to know which is better and which is worse. Don't worry if one way fails -- there is going to be a next year. My theory about campaigning is that a successful campaign is made up of a series of small failures. This is the only way to look at the business. So if you try one way of presenting the rating to him and it doesn't work, try a different way next year.

One of the way to present the rating to a prospect is face-to-face. "I came to see you about Israel -- we are starting our campaign -- last year you gave \$5,000 --- I came to ask you for \$40,000." Get it out in the first sentence. Let it explode.

Then explain why. All the time you are explaining why, his little computer will be working, trying to figure out what his answer to you is going to be; how much can he get away with.

Don't talk too long. The shorter the better. Don't give him too much time to think. Get him to start to talk. Throw in facts. Throw the number on the table. Talk quickly -- one, two, three minutes. Pick the point: security, the Russian Jews. Then say, "What do you think?"

So one way is to give it to him between the eyes, straight and fast. But some people will say that is not such a good idea -- they do not like it that way; there is another way. You can be a gentleman and give it to him in writing. You can take a pledge card, add his name and the amount of money he gave last year, and in big letters with different color write in what you want from him this year. There are those who believe this is more polite and more effective, because then he doesn't get angry with YOU. This is impersonal. He may be angry at somebody -- but he doesn't know. Certainly not at you, so you have a better chance to work with him.

There is another way: take the pledge card, put it inside an envelope, seal the envelope and hand it to him. Theoretically you don't even know what is written on it. You are bringing the envelope -- you are the postman from the Committee. You are bringing him the message. THEY are asking him for money. You don't know how much, but you are going to tell him why you really need it. This is more indirect.

What I am outlining here is the psychology of how we do this and the methods we use. But we must be 100% truthful. If anyone catches us, even

once, using a trick which is not exactly accurate, we lose our credibility. What else do we have? Where does my power come from? And I DO have power. It comes from two things only: 1) I am a professional. It means I know more than you do. I don't have to say it. By the way I act in my daily life everybody understands it; 2) I am true down to the tips of my fingers. You will never catch me saying something which is not 100% accurate. I may have my own way of presenting it -- I yell, I bang on the table -- but THERE IS NEVER ONE WORD WHICH I EVER SAY WHICH IS NOT CORRECT.

Never, never deviate from the truth, from the facts. If you do, you lose your credibility!

You and I never have an excuse for saying we made a mistake. Professionals don't make mistakes. A professional man makes a mistake? Out -- finished.

I said earlier that this is an art, not a science. Part of the art depends, obviously, on the psychology and the personality of the individual doing the soliciting. If your mind, your emotional makeup is such that you like to build a logical case and you have a feeling that more intellect and less emotion -- more use of logic and longer explanation than slip the figure in, get it in at the logical point in your presentation and not necessarily at the beginning -- works best for you, then obviously that is the way you should do it. There is no hard and fixed rule. What I am giving you is the projection of my own personality, and if your personality goes exactly the other way -- I don't say I am right and you are wrong. You do what is organic for you IF IT WORKS -- this is the only criterion.

My feeling, basically, is that a man does not give on the basis of an intellectual response -- he gives as an emotional response. And so when I talk about intellect and logic I am talking just in terms of the structure of the presentation. In terms of his response you have to maximize his emotional reaction to it.

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Lecture by Rabbi Herbert A. Friedman
December 31, 1972
(Substantially edited from tapes)

PERSONAL SOLICITING

When in the campaign calendar do you start personal soliciting for big gifts? My recommendation is that when you make up your calendar and you determine what the first event in the campaign is, that your personal soliciting start about one month before your opening date.

WHENEVER YOUR CAMPAIGN CALENDAR STARTS, AT WHATEVER POINT YOU SAY THIS IS THE POINT FOR BEGINNING, ONE MONTH BEFORE THAT YOU HAVE TO START WITH INDIVIDUAL PERSONAL SOLICITING.

Pick your targets carefully. Go to see those men who have already been rated. The climate amongst them will still be very cold at this early date. If your opening date is October 1, 1972, for example, you are going to see him early in September for his 1973 contribution, which he may not pay until the end of 1973 in some countries. So you are talking to him six, twelve even sixteen months prior to the time he is actually going to give you the money.

Suppose he balks. Suppose he questions the accuracy of your rating based on what YOU say will be the needs in another 12 or 16 months. You have to be able to answer him, very straight, by telling him that you are asking him early in order to have an example for other people. That is one reason you are coming to him early --you need examples.

Second, you are coming to him with the highest taxes you can think of, to cover any contingency which may arise next year. You are asking him for a very high amount, and you explain to him WHY his rating is so high. If he will put his taxes at this level and set an example for others, then no matter what happens in the next 12 months, we cannot expect more taxes from him if he has already agreed to pay the highest possible level. You tell him that you are working like a government: When does Pinhas Sapir bring in the tax sheet for the Israel government? Also six months in advance.

Do you go singly or in teams? How many men should go to see one prospect? The argument goes back and forth, like a pendulum. You can argue for the next hundred years but there is no clear answer. Everything depends really upon two things: how good your solicitors are -- if they are very good, excellent, first-class people you can send one man alone to see a prospect; and if the solicitor knows the story, all the facts and has a good voice, excellent personality, is not afraid, embarrassed or shy -- if he has all these characteristics and is number one, send him alone. But this is very rare.

You usually wind up sending two people, each one fifty percent qualified. This equals the needed one hundred percent -- and that is the best you can do. Therefore you have to think in terms of two going as a team.

But this raises still another question -- How much manpower have you got? And how many prospects are you trying to see during what period of time? At the very beginning of the campaign you do not have that many prospects whom you are trying to see. If you are working a month before your first event, and you are simply looking for some examples you do not need too many -- maybe ten or twenty, maximum. When they start a campaign in a place as large as Los Angeles, if they can start with fifteen or twenty pre-solicited gifts before the first function, that is enough to get started with. Ten is enough for Belgium; twenty is enough in England.

Because you are not trying to see too many people, and you are not too busy that first month, I would say find enough manpower to send two to each person, and then you have two brains working. One man will think of one thing to say, and the other man will think of something else to say.

Is it better to send three -- four? No, that is neither right nor necessary. It's too much.

WHEN YOU SOLICIT YOUR TOP PROSPECTS YOU GO WITH YOUR TOP LAY LEADERS ABSOLUTELY!!!

There may be some cases, but they will be the exception, where it is better for you to stay away. A certain prospect may be angry or annoyed with you for some reason, so maybe this year you should not go to see him. Leave him alone this year. But in every other case the rule is that for the top people you must go with your top lay leader.

If you do not have enough local manpower, exploit the Israeli personalities available -- but not haphazardly. You can bring Israelis into your campaign for purposes of solicitation, and not just as speakers. If you have brought in an Israeli for this purpose for one week, ten days, or two weeks, you take him with you on every visit, but you cannot use him to do the actual solicitation. He is there as a resource person for you -- as a symbol. YOU are the campaign, and HE is Israel. Exploit him.

Do you go to solicit your prospect with an appointment, or do you just drop in to see him? This is a very important question. If you are going to try to get an appointment, that means you have to work in advance on the telephone or by mail, or with secretaries calling each other back and forth. It is a big job just to get the appointment. If you call him and say you want to see him he is going to ask, "What about?" And if you start to tell him on the telephone -- you may lose him then and there. He'll say you do not have to bother coming to see him -- just tell him what it is all about. If you get pulled into this kind of conversation you have lost the game because the best you can get on the telephone is, "I'll give what I gave last year."

Now go the other way. If you do not call for an appointment, if you just take a chance and you, and another good solicitor, just pop into his office, he may be out of town or you may not get by the secretary. He'll be in a board meeting, etc.

I came to the conclusion many years ago DO NOT DROP IN!

A person might drop in on a very informal basis, but then you have to be careful about when: 5 o'clock in the afternoon when the pressure is off for the day, when he is having a drink in the office -- but that is on a very personal level only. Then, if you are a good friend of his he will ask you to join him for a drink. But this is taking such a chance that it is not worthwhile.

YOU HAVE TO ASK FOR THE APPOINTMENT. I think if you can choose which way you should go -- GO ONLY WITH AN APPOINTMENT. And if the fellow gives you a hard time on the telephone, the only advice I can give you is don't get into the topic on the telephone. Call for an appointment yourself. You are the Director. Or, perhaps, get the lay leader who is doing the soliciting to make the call -- and tell him HOW to make the call.

"Mr. X"-- or "Jack," I would like to come and speak to you tomorrow morning at ten o'clock with my friend, Sam...." Or, "The Police Commissioner from Israel, Mr. Rozolio, is now here and he is seeing some very, very top people. He'll be coming with us also tomorrow."

Sample conversation:

"What do you want to see me about?"

"About Israel."

"But this is not a good time for me."

"Ok, if ten tomorrow morning is not good, when is good? Two o'clock, four o'clock? Mr. Rosolio is here with us for seven days -- give me a time in the next seven days."

Now he finds it hard to escape. If he still says he is very busy now, and next week, etc., then you have to get tough. Your lay leader might not be willing to, but you know how to do it.

"Mr. X, you can give me one hour in the next seven days. DON'T TELL ME YOU HAVEN'T GOT ONE HOUR!"

I always believe in making appointments during business hours, in the office. This is against policy in most countries, and I think they are all wrong. They think you should go to see the man in his home during the evening. I say NO -- go and see him at his club, take him to lunch at a hotel, see him in his office. THE WORST THING IN THE WORLD IS TO SEE HIM AT HOME. His wife is on one side, the television is on the other, the children are yelling all over the place, he is tired and nervous. In his house you are at his mercy. If you take him out you pay, and he is yours for an hour.

You must force him to give you the appointment no matter how hard you have to go at it. Even if you finally have to say (which I find works most of the time) -- "Hey, what's the matter with you, you have damn bad manners! You're being a bore. I know you for ten years and I'm asking you for an appointment -- who the hell do you think you are that you won't give me one hour to talk with you? Are you the King of England or something?"

You have to be the aggressor. You have to provoke a crisis. Usually he will give you the appointment -- but you may have to force it.

He may break the appointment he has given you, in which case you have to begin all over again -- even harder.

It is terribly important that you should not lose your nerve or your patience. Because, in fact, in trying to get the appointment you are already making the solicitation, and he knows it. If he wins, and you do not get the appointment, he also wins in the matter of his contribution. Because no one will get to see him he will give what HE wants. That's why the appointment is so crucial for you, and once you start either make up your mind to win -- or don't start. He may break the appointment a second, third time -- but you have to keep at it and fight it through to the end. You MUST go with an appointment! Don't just drop in -- it's beneath your dignity. You must fight to get the appointment, and you must understand what the fight is all about.

Ultimately, the real fight is not the appointment -- it is how much money he is going to give. But the appointment is the first step. If you meet him at a party or a social function, that is a good gimmick for making the appointment. It works, by the way.

You can also have a close friend of his tell him you are going to call for an appointment to smooth the way for you. In my opinion, I would rather have the important friend come with me and do the soliciting. You want the important friend to be with you for the solicitation -- not just to make the appointment for you.

I think the worst place to talk to him about a contribution is in his office. Speaking to him at home is not nearly as bad as speaking to him in the office with all his business problems around him. He knows you have come to try to take money, and he will try to cut it as short as possible.

Most soliciting is done in the homes in the evening and it is lousy. Many wonderful people start out at 7 in the evening, in the rain and the cold, and they have a little list, and they get into the car and go to someone's house and ring the bell. But the wife answers the door and says that her husband isn't home that evening.

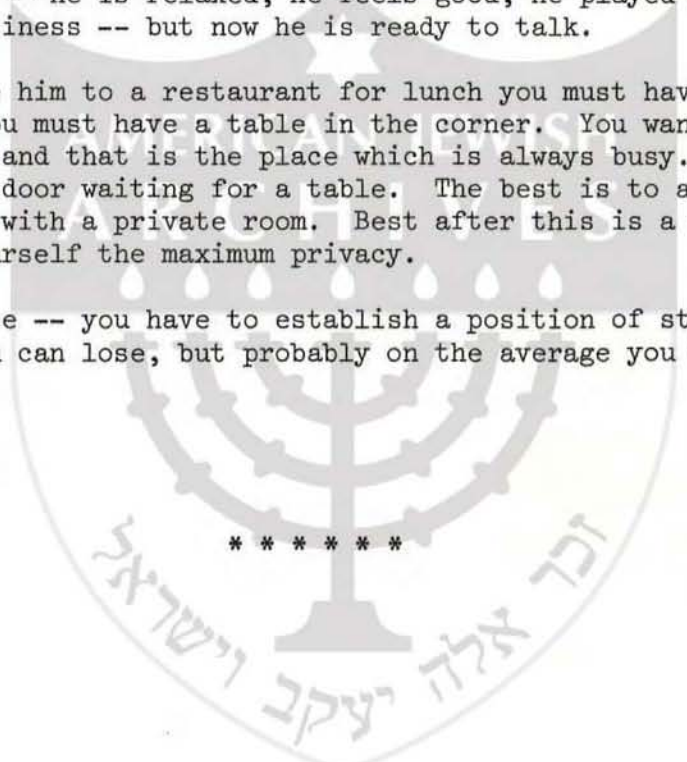
I believe in the seriousness of this business and, remember, we are talking now only about big gifts. I am talking about the man to whom I

will talk about big money, as big as any other business deal he is involved in that week. When I go to his home at night he comes home from a day's work; his wife and children are there and even if I have an appointment with him I find that this is not the place where I want to talk to him about giving \$100,000. Because when he is at home he is thinking about what it costs him to run his house. And his wife is interrupting with her physical presence, and perhaps even with questions about why he is talking about giving away so much money.

I want to get him into a different atmosphere. I will play golf with him at the club Sunday afternoon, and while we are playing I will tell him that later, after the game, I want to talk to him about something. Then it is different -- he is relaxed, he feels good, he played golf, ate, drank. Then we talk business -- but now he is ready to talk.

When you take him to a restaurant for lunch you must have a fixed reservation -- and you must have a table in the corner. You want to take him to the best place, and that is the place which is always busy. You don't want to stand at the door waiting for a table. The best is to a private club, or a restaurant with a private room. Best after this is a table in a corner, to give yourself the maximum privacy.

Home or office -- you have to establish a position of strength, and to further it. You can lose, but probably on the average you win. Strength has validity.



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Lecture by Rabbi Herbert A. Friedman
January 7, 1973
(Substantially edited from tapes)

SOLICITATION TECHNIQUES

There are five basic points in solicitation technique:

- 1) The opening.
- 2) Presenting the case with any aides you may want to use.
- 3) Use of an Israeli personality, if you have one.
- 4) The common objection -- the most usual the man will raise.
- 5) How to close.

1. THE OPENING

We have already covered the problem of getting the appointment. For the sake of argument let us say there are three of you -- you, the director, your local chairman, and you have with you a deputy cabinet minister from Israel.

Your prospect invited you to his club for lunch and you are sitting in a very small private room -- just the three of you. The circumstances are perfect, ideal. He already knows you need a top-level opening gift. You told him he has to be the number one man and that you want to tell him why and give him some information.

By the way, it is always a good idea to know how much time you have. Then you know how to play your time.

This, then is the setting for your solicitation.

HOW DO YOU START AND WHO STARTS? WHAT DO YOU SAY? The local chairman of the campaign should open and say to this businessman -- who is his friend: "John, last year you gave 40,000. We came here today to ask you give give 100,000 this year. Now I'll tell you why." The chairman should talk for a very short time -- five minutes -- so as not to give the man a chance to turn his mind off.

Tell him in a nice, quiet simple way you need this much money. And the reasons that the chairman should give to him, in my opinion, are not what ISRAEL needs. Do not forget that you have the Israeli personality at the table and he can do that. And you, the Director can do that too. So what can the chairman do which is unique to him?

He can explain to the prospect what he is trying to achieve this year

in the community; what they did last year, why so much more this year. "Last year we raised 10 million, and we are trying to raise 20 million now. We have a fantastic push to make. We have to find many new people, we have many new men on the committee, many good things working for us. It is going to be a good campaign, but I need one fellow to give me a good start. So I came today to ask YOU to give me that good start."

In other words, the chairman talks as one good businessman to another businessman: his business is the campaign, and he is explaining to the prospect how he has to succeed in this and why and how THIS man is so important.

That should be the opening -- that should be the job of the chairman, and if he does not want to do it the director has to do it. It is not as good, but somebody has to do it. But only one of these two people, NOT THE ISRAELI.

Wait for the prospect to react. He may not say anything. He may not want to come out with any objections. He may be holding fire. He may not want to say yes or no immediately. Let him say what he wants to say. Do not push him. Then move on.

2. PRESENTING THE CASE - WITH AIDES

You have made your opening and he knows what you want. Then you have to give him the argument. "Look, John, I want to tell you what is happening in Israel. That's the main part of our campaign. That's what this money is for, and let me explain to you what the problems are in the coming months the way we see it."

If your prospect claims to know everything, in a very nice way you have to explain to him that he doesn't. Even though he is a good friend of Israel, even though he thinks he is informed, you must make it clear to him that he is not, because you must maintain the advantage over him in being superior in knowledge. This is your strength: the knowledge about the case you are presenting to him.

But don't be completely negative. "Look, John, I'm sure you know a great deal, but...."

At this point HOW you want to present the case depends on whether or not you have any aides at your disposal. Now what do we mean by aides? It very often can be only one piece of paper, which tells what the expenses are for defense, for immigration; what portion of those expenses are the Israeli people meeting through taxes; what is the debt of Israel in foreign currency and local currency.

"John, take a look at this, and let's read it together." Immediately you have captured his interest because he is a businessman and he understands figures. Give him the figures on a balance sheet -- not complicated, only one page. DON'T give him 25 pages to read. This is one kind of aid.

As another aid you can begin with audio-visual, such as tape recordings, small cassettes, short films. I am very much in favor of bringing in a small projector, putting it on the table, putting in a film of from 3-5 minutes -- never more. Show him something about housing or immigration or security, one of the major themes, as an aid to get you started in presenting the case.

You can take an article from an Israeli newspaper with you and translate one or two paragraphs there at the table.

Raising money is not a question of saying "I need to build ten houses, so give me \$10,000." Statistics play a part in it, but a much bigger part is to give him pride in what Israel is, and if you can give him pride he will identify more closely. Create this feeling of closeness which comes from being proud of what Israel is. You have to be able to do it. You have to be intelligent enough, good enough with your words and you, yourself, have to believe it. If you don't, then you can't develop it effectively because it is the most sophisticated argument of all.

Why is Israel so important to keep alive and make stronger? Not only because of the 3 million people living there. Because of Israel's destiny, and that is the most tremendous historical, religious, metaphysical, mystical reason. It has to be a big reason to capture his heart and soul.

Eliezar Levne recently wrote an article about what Israel will be like in the next ten years, in which he claims that we will have 7 million people -- 7 million Jews living here. Put this article in front of the man and say: "Look, you don't know Mr. Levne, but he is one of our intellectuals. I don't know if he is right or wrong, but what is the difference -- who can prove anything. He is talking about a country with seven million people in ten years. It doesn't matter what year -- 1983 or 2000. It is still a very short time we are talking about. We have to fill up the Negev and Sinai. We can have TWO Weizmann Institutes; we surely will find the cure to cancer, write more symphonies for the world. We may even write another Bible -- who knows!"

You have to open his mind; you have to be creative and imaginative. This is what I mean by aides. You can use very simple financial documents. You can use slides and films, editorials and essays.

You must think very carefully what you want to use and how you want to use it. You must prepare and plan very carefully in advance. Then, simply and quietly, start to present the facts. Take five or ten minutes for this phase of the solicitation.

4. THE USUAL OBJECTIONS

- a) I am not interested in Jewish life.
- b) I am interested in America first, or England first, etc., and instead of giving money to Israel I am a patriot of the country in which I live and want to give money here first.

- c) He may tell you he has other commitments in his home country or in Israel.
- d) He may say to you why do you want to push so much for immigration, while defense is so costly.
- e) He has no money -- lack of cash.
- f) He will talk along the lines of being a leftist politically. He will say that Israel should withdraw and make peace -- then she won't need so much money.

He just doesn't believe that much in Israel, and he does not believe in the Jewish people. Maybe he has a non-Jewish wife. Maybe he is not giving his children any education as Jews. He gives 40,000 because he has to give something. He can't live in the community and not give something. But to give 100,000 -- he does not believe in it. He simply does not believe so much in Jewish identity, survival, etc.

Here you have a hard job on your hands, because you have to be like a missionary, to try and convince him -- not about the money -- about his Jewishness. He does not want to be Jewish, and you have to tell him that he is whether he wants to be or not. It doesn't matter what he says he is. The goyim say he is Jewish, the world says he is Jewish, the label which is written on him says he is Jewish. So he is, and what can he do about it. There is no such thing as "not considered Jewish."

If he says he is not Jewish and the goyim don't consider him Jewish -- stand up, shake hands with him and tell him, "If you are a goy, we made a mistake and we apologize. You gave 40,000 as a nice goy. Thanks a lot, shalom, goodbye." If he says he is not Jewish and his friends don't consider him Jewish then you cannot go on, because this is a man who doesn't call himself Jewish.

"The State of Israel is fine...I'm not against it, but what the hell, I have no responsibility to build it up. You're telling me about the survival of the Jewish people against assimilation. You want to build a Jewish nation for the future -- to me it is not important. I don't really care. I am doing what is the right thing. I give a little money. Beyond this I'm not interested and just don't care."

THIS IS THE TOUGHEST OF THEM ALL! The fellow who says he is indifferent and does not care. All you can do is to keep banging away at the words 'duty and responsibility.' The goyim label him as Jewish; he labels himself as Jewish; his father circumcised him as Jewish -- he cannot call himself 'not Jewish' -- HE IS JEWISH. The only question is WHAT KIND OF A JEW IS HE? Does he really want to be called indifferent, say he does not care? This is not being much of a man, and here you must try to appeal to his sense of manhood.

If two men are in a boat and one is pulling oars, while the other sits there and does nothing to help -- then he is a coward, a deserter, a traitor. If he wants to get out of the boat -- call himself not Jewish, convert -- fine, that is his right. I have more respect for him if he does this, because then he is doing what he believes in. But to just sit there and not be a man! So I find that the manhood angle is the only one I can use with him.

If he protests that his interest lies only in his own community, keep the argument in the abstract -- not specific to him or his community. What you have to say to him is, "Look, you live in England, or Canada, or Detroit -- not likely that there will be some Hitler to kill the Jews there, but you have a responsibility to the Jewish people and to Israel."

You must alter or completely negate his lack of interest in Israel, but not by threatening him. The only argument you can use is: "You are Jewish, you don't deny it, the Christian world calls you Jewish -- therefore you have to be a man and live up to the definition of what you are, even if you have no vision or imagination for the marvels of the Jewish people, the fantastic creativity of the Jewish people. If you really don't understand, agree or are interested in all that then I'm sorry for you. You have a very rich background that you are not taking advantage of. But if this still does not excite your interest, I'm telling you that you have to behave like a man."

In the case where he protests that he is more concerned with his own community vis-a-vis Israel, you must argue about movements of Jews, migrations of Jews.

"So what if you are sixth generation in Switzerland? Our people lived in Spain for fifteen generations and then were thrown out. So don't be such a patriot for Switzerland."

"I'm not against America, but listen -- seven generations ago your family came from someplace else. They were thrown out of Spain; went to Holland, then to the United States. It can happen again, so don't be such a patriot for America. Yes, I'm a good American. I went to an American University and I served in the American army. But the center of Jewish life is not America, or England, or Switzerland -- it is ISRAEL."

You don't tell him that his country is a bad country. You can only say to him that as big a patriot as he is for Argentina, he must know perfectly well that he must also be a patriot for Israel. You must keep pressing him to remind him that a man can have more than one loyalty. Do you love your father and not your mother? If you have two children do you love one less than the other? Every man has many loyalties. I can be a good, loyal, patriotic American citizen -- AND an Israeli citizen at the same time.

5. THE CLOSING

Five minutes for the opening -- ten minutes for presenting the case -- fifteen or twenty minutes to answer all his objections. KEEP YOUR EYE ON THE CLOCK. You have to cut short your chairman or the Israeli -- or even the prospect. Hopefully, you don't cut anyone -- you will have enough time. But you have to bring it to an end.

I believe, as the chairman should make the opening, he should make the closing. He can do this assisted by the Israeli. And here is the extra little bit of pressure by the Israeli -- for he can come in at the closing. It is not absolutely necessary, because this simply is the asking figure, but it is good if he does.

So you or your chairman will watch the clock, and will know when to say: "John, we are at the coffee now, almost finished, and you want to go back to your office. We have had a very good conversation here. Now WHAT DO YOU SAY? OK for 100,000?"

Now, what are the possibilities? OK -- or No -- or I can't do 100,000 but I can do 80,000.

You and your chairman have to decide in advance what you will accept gracefully -- quickly -- and with a smile. You have discussed this in advance and have briefed the Israeli, that if the guy will give 75-100,000, you will take it. Because if you can get him to go from 40,000 to 80,000 this is a very good example to go to other people with.

But you do not give in easily. "Well, John, 80 is pretty good, but we had hoped it could be 100 -- but OK, never mind. 80 is fine." This, because you want to put in his mind that you are just a bit dissatisfied. Next year you can say, "John, last year when I asked you for 100,000 we took the 80, but I wasn't really happy. So now, make it up and make it 100,000 this year."

YOU MUST ALWAYS LEAVE THE DOOR OPEN FOR NEXT YEAR.

But suppose he goes from 40,000 to 50,000? What do you do? You have to have decided in advance whether you want to accept anything below 75,000 or whether you have an absolute minimum. Then you do not close. Leave it open: "John, you really didn't get the message; it is very nice you have offered us an increase from 40 to 50. Thanks, that's being a gentleman, but NO. If you go from 40 to 50 then everybody will give just a little bit of an increase. We need pace-setting. This is not pace-setting. Think it over and let's meet again in a few days."

You must have made this decision in advance before you start. Don't try to improvise -- look at your chairman, and your chairman looks at you. NEVER! You decide your tactics in advance.

The initial gift is the closing gift. If you say, as they do in New York City -- I will accept 50,000 now, but I know that your closing gift

will be 90,000 -- that's ridiculous. If they accept a gift -- that's it. They can call it an "initial gift" but they never do get more. Forget that kind of rationalization.

So 1) he gives you what you are asking; 2) he gives you something less, but very big and you have made a decision in advance to take it gladly; 3) he gives a very small increase over last year and you made a decision not to take it, and to postpone the closing.

The fourth possibility is the hardest closing of all. In the first three possibilities you have made the decision in advance as to what to do. He gave forty -- you asked him for 100,000 -- he offers you 60,000 -- a 50% increase. You decided in advance with your chairman that if he offers you 50,000 you will postpone and not close; but if he offers you 75,000, you will take it. Now he offers you 60,000. There is no way for you to decide in advance whether to accept it or not. Only in the course of the conversation can you see whether 60,000 is a good figure.

It depends on what you learned about him. Maybe 100,000 was too much and you have over-rated him. Maybe he tells you something about his business that you didn't know about. And you have to make a decision on the spot. You could not have made it beforehand.

The only way to handle this is to be honest. You and your chairman should discuss it in front of him -- openly, as if he were not sitting there. "...Jack says he can't make 100...he really does feel strongly about Israel..he does have a problem...he can't really give 100..." You want to decide if this will give you a good enough example to start with or is it too weak?. "It may not be as good as we hoped...but it will give us a good start...I think we should accept it and not waste his time for another meeting...."

Such a conversation going on between you and your chairman shows that you did not make a decision in advance, and are talking openly in his presence. He becomes part of the whole decision-making process. You and your chairman have to always be on the same wavelength. It has to be perfect between the two of you -- no mistakes -- never misunderstand each other.

There is still one other possibility -- that he will says to you that he is not ready. He doesn't name any figure, so you have no choice in the matter. You want to close, but you can't. In case one, two, three and four it was always up to YOU whether to close or not. Here, again, you have to decide in advance how you want to play the game if he should say he wants to think it over. If you sense that he is asking for time to see how close he can come to 100,000 (after all, you shocked him, he didn't know you were going to ask for 100,000 -- he gave 40,000 last year!), then YOU HAVE TO GET A DATE BY WHICH HE WILL GIVE YOU AN ANSWER. You must never leave it up in the air.

You have to say, "I understand, we asked you for a lot of money -- much more than you planned. We gave very strong reasons -- you want to see what is the maximum you can give. Let's meet next week."

GET A DATE. DO NOT LET IT REMAIN OPEN. NEVER.

The last case is where he says he wants to think it over and you have a feeling that he is just stalling you, delaying you -- and he already made up his mind. Here time will work against you. Then you have to have a pre-arranged signal with your chairman to push for a closing now, and not let him use the answer that he wants to think it over.

Maybe if you push him now you are going to lose money. Still, you do not really believe that he will go home and think it over, and that his conscience will bother him. You have a feeling he will try to escape, and you say, "Now. I must close it now. I insist upon it."

You can then use your Israeli to help you. Perhaps he can say, "Mr. X, I know you want to wait. But we have Russian Jews coming in every day, and they can't wait. I need an answer now."

If he is more worried about security, you tell him we are getting more airplanes every day, and that Israel must pay the bills which come in every month. We can't wait.

Whatever you use on him -- say, "WE CAN'T WAIT!"

Bring in your Israeli to push and force a closing, and if you have to force a closing because you suspect him, then don't worry about losing any money -- because he is going to cut you anyhow, or not increase you. It depends on how you size him up. Force him, and force him hard. You have here a very tough case. Don't look for a very big increase, and protect yourself against decrease. So you may have to eventually take a small increase and settle for it. That's unpleasant, but if you have to do it, then do it!

* * * * *

Lecture by Rabbi Herbert A. Friedman
January 14, 1973
(Substantially edited from tapes)

SMALL PARLOR MEETINGS

You can build a whole campaign on small parlor meetings and if you have enough of them -- the entire campaign will be a success.

You can have a small parlor meeting at any time during the course of the campaign, because it is a very excellent device by which you can pick up your open gifts.

If you start your campaign in October, don't think that you will have all your big gifts by November or December -- or even January. Somebody is always going on vacation, etc. Watch where and when your people are going for their vacations, because you might even plan very far ahead to have several small parlor meetings in the places where they go. But be very careful about this, because they may object to your interfering with their vacations.

One way to overcome this risk is to find the proper person to host a wonderful party on a yacht, or in a club, or in someone's beautiful apartment. We are only talking about 10, 15, or 20 people -- it is always a very small group. The gathering is set up within a social context, and at some point in the party the host explains what it is really all about. They get it all over with in 15, 20 minutes -- and go on with the party.

You should decide in advance at what level you want the meeting -- \$10,000; \$50,000 minimum? Decide according to your own standards of what are big gifts in the country where you are working.

At the same time that you are running a mass movement campaign with a big meeting for \$5, you can run a parlor meeting in somebody's house for \$20,000 on the same day. Everything can be going on simultaneously.

You must be very, very clear in your mind about the purpose of the meeting. Is the meeting going to be for purposes of education, or for the purpose of fund-raising? Unless you decide in advance on one purpose, and only one, the meeting will be very confusing and you will not succeed in doing either. The purpose must be only one -- and very clear.

There are several purposes for which you can hold such a meeting:

- 1) Education: If you decide that you have a group of people who have never been to Israel and who do not know much about it, but who have a lot of money, you can hold very special, high-class, educational meetings to teach them what Israel's major problems are -- and not ask for one cent. You will have a second meeting for that later.

Also, if you have a group of people in the top giving level, or prospects for top level, who need additional education, then you plan very

carefully how to give them this education. I would recommend that the best way to do it is not with some famous government minister. Bring somebody who can talk to them charmingly, interestingly and intelligently about what life really is like in Israel, without cliches, without propaganda. A young professor is always good; a journalist is always good; somebody in the arts -- but not somebody from the government with propaganda.

Your speaker must have charm and patience, and be willing to listen to and answer questions. And he must be able to win their confidence. These very rich people have to feel open and free enough with him to ask what is on their minds. They will learn something, and then the process of education deepens. This is the best type of speaker for such a meeting.

The meeting has to have a long question and answer period. Such a meeting should NEVER BE AT LUNCH because you never have more than one or two hours. It should be in the evening or on the weekend.

- 2) Fund-Raising: The invitees are solicited at the meeting.
- 3) Rating: Of other people.
- 4) Organizing a mission to Israel for themselves.

These are the main purposes for holding such meetings. There may be a few more, but it always has to be a MAJOR PURPOSE IN THE CAMPAIGN.

* * * * *

The best rule to go by with parlor meetings is to have only the number of people you can have in someone's private home comfortably. If you have men only -- then twenty or twenty-five; fifteen is even better. If you have men and women, then have only ten couples -- maybe twelve.

With limited space do you or don't you bring women? I always say yes, although many people disagree. If you can get the wife or the girlfriend to understand the problem, then very often I have seen cases where the woman says to the husband, "You can give more." She knows better than you how much money he can give.

The intrinsic value of this small meeting is its intimacy. All of life today is big. You have a number for everything. This is part of modern civilization. What people want today is NOT to be just a number; they want to be a name, a man, a person. When you have a big meeting of 500 human beings in a large hall they are all just numbers. But if you bring a man into a room with ten people -- he becomes an individual.

You have to be there to make sure that everything goes as planned; that the chairman says what you have told him to say. You organized and built the meeting. You decided the purpose of the meeting; you know the achievements which are possible. You have to make sure that everything goes according to plan. And if you have done your work properly in advance, you will never have to open your mouth -- everything will go according to schedule.

You have to go into this parlor meeting of 10, 15 people with a certain percentage of the gifts already committed in advance, and those you can only get by personal canvassing. You use these meetings to try to get the gifts of another percentage of the people. If you have a meeting of 20 people, I would always want to walk into that meeting with one-fourth to one-third pre-solicited in advance.

From a theoretical point of view, if I had 100 per cent of the gifts pre-solicited, the evening would be better. I would still have the meeting, because it can then go nowhere -- except up. All that can happen if you have pre-solicited every person there is that they will raise their gifts -- guaranteed.

You and your chairman know all twenty gifts, but the people who come don't know that everyone is pre-committed. If you have a good pre-commitment from someone -- from 20,000 to 50,000 -- and there is another fellow in the room who went from 20,000 to 30,000, call the big increase first. When your 20-30 man hears "20 to 50" in that one split second of decision before he announces his gift publicly he may increase right there on the spot. How much you don't know. This is the dynamics and psychology of private meetings. If you call your names in a certain order, one name can affect the other. So, theoretically you have canvassed everyone in advance, but, in practice, you never do.

If I don't have at least 25 per cent in my pocket beforehand, I would rather cancel my meeting. I'm not ready yet. I like to know as much as possible in advance about everything that is going to happen, and while I cannot know 100 per cent, I try to reach 90. If I have five or seven gifts in my pocket, I go on with the meeting.

Where you have a meeting with couples and the purpose is fund-raising, you can have two separate meetings: the men can raise their money in one room; the women in another. If you have a house big enough, that is. They can listen together to the same speaker, and then split up for the fund-raising. The fund-raising procedure is the same for both groups.

But if the purpose of the meeting is education or something else, then they would stay together.

Stay away from Friday and Saturday for these meetings. You can't have public affairs for Israel on Erev Shabbat and Shabbat. Saturday night is also difficult from a technical point of view because for many people there are regular social events. Sunday might be a good day, depending on the

habits of the country in which you work. In the United States, England and France, Sunday is a bad day. The man who is the host on Sunday is not well organized because he cannot get services. In most countries nothing is available on Sunday.

FRIDAY NIGHT, NEVER; SATURDAY NIGHT, POSSIBLE; SUNDAY NIGHT, BETTER; MONDAY THROUGH THURSDAY EVENINGS ARE BEST.

* * *

The single most important factor which will determine the success or failure of the meeting is your host. The attendance you will get is directly related to him. The two go together. Your meeting will be successful, first of all, depending upon who the host is. If he is the most important, attractive, prominent, significant and pro-Israel person you have in your community, then your meeting will be a success. If, on top of that, he is also the biggest giver then you have still more chances of success.

You have to try to get the most prominent and important men, with the best houses and the best addresses that you can find. This puts the whole campaign on a higher level, which is where it belongs. You cannot use a Rothschild to be a host for a \$5,000 meeting, even though \$5,000 might be a pretty high level meeting for your community. At that level, you have to have a host who is giving \$25,000 or \$30,000 -- good, big gifts above everybody else -- but not a Rothschild. You cannot have your host too far above the level of the people he is inviting.

I am always in favor of using the host to send the invitations. This will help to get the attendance, which is not easy. Use his private stationery: "Mr. ----- has the honor to invite you to dinner at his home, etc., etc.-----for the purpose of rendering assistance to Israel... listening to a guest speaker from Israel...assisting the Magbit for Israel."

However you word it, THE INVITATION COMES FROM THE HOST.

* * *

By September 15 you and your chairman have selected someone to be the host for a dinner party, and he agrees. He gives you three alternatives; October 15, 22 or 23.

Let us say the purpose of this meeting is fund-raising. Prepare your list of names very carefully, indicating also when you want to see these people for pre-solicitation. You have to tie them together. You have a visiting guest coming from Israel who is going to help you canvass between

October 1-10. During those ten days, hopefully, you can get five or ten gifts successfully by canvassing. And so you pick October 15 for the parlor meeting, hoping to have half a dozen gifts in your pocket by then.

You do a quick telephone canvas of the secretaries of the 20 men you want to invite, to see if they are going to be in town on October 15. 17 of them will be in town. Now go back to the host and tell him you have selected October 15. Give him the list of names of those people to be invited, together with the draft of the invitation. The host sends out this invitation over his name, on his letterhead.

These invitations go out approximately three or four weeks in advance. Check what is going on in town on that date -- if this is the night of a big opera, ball, etc., because the very people you want are those who are going to attend things like that.

After the invitations are sent you wait about one week for the returns to come in, and see who is attending. If you are lucky and they come in quickly by mail, fine. Usually this is not the case, and so the second push begins for getting the attendance. This push has to come from the host himself. That is why the host is so important. He has to use the power of his own name and voice. And I underline it fifty times. HE MUST MAKE THE TELEPHONE CALLS HIMSELF TO THE PEOPLE WHOM HE INVITED -- not his secretary to their secretary. THE HOST MUST DO THE FOLLOWUP FOR THE ATTENDANCE HIMSELF. Then chances are you will have a perfect attendance. Nobody will insult him. Anyone who does not come will have a good reason. It may be a false reason, but it will be a good one, which he will have to give to the host personally.

It is so important to have the right host who can apply this subtle, indirect pressure -- social pressure.

You have to be in touch with the host every day to see if there are new acceptances. If, ten days before the meeting, you have ten acceptances and seven rejections, you have to decide what to do -- Do you want to go with the ten? You still have ten days -- Do you want to take a few other people, invite them, and drop down one level of giving? You think ten people are a bit too few; you would like to have 12, 14, 16. You decide if there are a few more people in town, prospects, even far out ones, that you want to take a chance and bring into this meeting. You still have another ten days. So you send them invitations and the host follows up again with them.

The whole point on checking up on attendance early enough is to give you a chance to be flexible; either to add to the meeting -- or to go the other way. Suppose you get three "yes" and fourteen "no." Do you hold the meeting? Of course not -- you cancel.

But you have to be able to cancel the meeting with enough time in advance -- not the day before. Not two days before -- but ten days before.

If you cannot get the host to call, then YOU have to do it in his name. You will have to fight to get the attendance. It will not be easy. But

once you have it, then you have a good meeting.

The procedure at the meeting has to be elegant -- nothing vulgar or cheap, and not overdone. There has to be a certain charm to it. The host speaks first and he is very happy that everybody was able to come; he is happy to see friends; he is most happy because all of this is for Israel. And immediately he puts the whole thing on a high level. This is not for me or you -- this is for something bigger than all of us. And he has here a wonderful friend who came here from Israel who is going to talk to us, and please feel free to ask him questions. This is a nice informal meeting.

They usually have some questions, and you have to check the time without looking at the watch. You, the director, have to have some signals with the chairman about the timing. He should be sitting close to you.

When the speaking and questions are finished, then comes the time for the announcing of the money. Basically there are only two ways to do it: 1) Either the chairman invites everyone to volunteer - and he goes in a circle, which appears to be very casual, very friendly, and informal; or 2) the other way is plan in advance the order in which you want to call the people, depending on what you know from what you solicited in advance. That's called "stacking the cards," whom you call first, second, third, etc.

With the cards "stacked" you can decide even fifteen minutes in advance how to arrange them, because all evening and during dinner conversation is going on all over the place and numbers are changing. The stacking of the cards takes place until the very last minute.

There is a third way which I have seen work. You don't call out names, not informally and not from cards. You hand out envelopes and in the envelope is the man's card, the amount you want from him, and a place for him to sign. But you have to have the feeling of your people, because if you think that they would prefer it this way, then you are doing them a favor and are allowing them to remain anonymous. Then they have to do you a favor and give you the amount of money you are asking for. I think this is the least preferable way.

The most preferable way is straight -- call the names. Don't go around the room informally because you may get some surprises which could then hurt the meeting. Furthermore, if you go around this way you cannot take advantage of what you did with the pre-canvassing.

The best system is always the straightest, right to the point. "Gentlemen, I have all the cards here and I'm going to call your names now and we pay our taxes to Israel."

There are two ways of calling the cards. One is not to mention last year's amount; the second is to mention the amount.

"Jack, last year you gave \$20,000; how about this year?" Now if he says 21, 31, 51, it will be an increase over last year.

"Jack, I have your card here - how much would you like to give?" This is much weaker, it is hiding something. Now if Jack says \$20,000, nobody knows if he is increasing or not so it does not come on strong. When you are calling the cards, you must try to get your chairman to do so giving last year's gift.

When all the cards are finished, say "Gentlemen, fantastic! We are off to a great start."

Or if this is a parlor meeting later on in the campaign, "Gentlemen, we are fantastic! We are beating the general average of the campaign."

On the other hand, if it is terrible, then say so.

There is no reason why you cannot turn a small parlor meeting into a weekend if you want to and can get, say, a luxurious yacht. It is more complicated and it may cut down attendance because some people will not be able to get away for a whole weekend, but it might in some instances help attendance because it uses very good imagination. It can be a very interesting, unusual, nice weekend, and some people might be tempted to go along.

I believe in anything which is different, anything which keeps it from being ordinary and which makes the giving of money easier. It is easier to give money in pleasant surroundings than in unpleasant surroundings. So why not? You don't have to be rigid. Be flexible. But always you must make your logistics possible to work with.

I am a very careful administrator of public funds. I have been with campaigns for almost twenty years and directly responsible for administrative budgets. But I believe that within a very careful budget it is wiser to spend some money on something interesting and exciting and different, and save money on some piece of mailing which anyway will go into the waste paper basket.

You are the director of your money. Think of how to spend it best. Use it for something unique. Spend it in a very interesting, imaginative and creative way -- rather than on ordinary things.

* * * * *

BIG GIFTS

1. Relative Importance of
2. Definition of

Herbert Feidman

(2)

6-session; 12-hour COURSE OUTLINE - CAMPAIGNING

1. RATING -

- a) when
- b) by whom
- c) how much (what are good standards)
- d) use of goal, in determining
- e) how present to prospect

5. PUBLIC EVENTS

- a) opening function
- b) closing dinner
- c) reporting process in-between
- d) public recognition for workers

2. PERSONAL SOLICITING (CANVASSING)

- a) when, in campaign calendar
- b) singly, or teams
- c) with appointments, or drop in
- d) re-assignment of prospects
- e) finding new prospects, at top level

6. REVIEW + RECAPITULATION

3. SOLICITATION TECHNIQUES

- a) opening
- b) presenting the case - aids
- c) assistance of Israeli personality
- d) most common objections - and answers thereto
- d) closing - "we have to make a decision - there is a Russian family waiting"
 - selling is now
 - leave it open, only if you have no other choice

4. SMALL PARLOR MEETINGS

- a) when
- b) purpose
- c) size
- d) host
- e) how obtain attendance

Rating ^{what are} ~~accepted standards~~ -

Campaign Phase

1. Rating -

by whom

how much (what are accepted standards)
use of goal or quota, in determining

when to do this

how to present to prospect

2. Personal soliciting

singly, or teams
appointments, or drop in
when in campaign calendar

re-assignment of ~~old~~ prospects
finding new prospects at top level

3. Solicitation techniques

opening

assistance of Israeli personality, or ^{other} team-mate

presenting the case, with

closing

4. Small parlor meetings

who is best host

how large

purpose of meeting

when?

5. Public events

opening dinner

closing dinner

reporting process in-between
public recognition for workers

6. Review and recapitulation

HERBERT A. FRIEDMAN

IV SATISFY THE NEED ~~TECHNIQUES OF SOLICITATION~~

- 1. Biological Needs
- 2. Security "
- 3. Social needs
- 4. Self-Esteem, self-realization needs - (but these must be created)

Solicitation is toughest sales process - because it is hard to figure out what need is being satisfied by giving away more. You must create a need + then present the product to satisfy the need. Create curiosity - and then sell a book to fill that need.

V. Communication AMERICAN JEWISH

Transfer symbols in hope of creating meaning on the other side. Force other man to listen, because he hears what he wants + hear, not necessarily what you are saying.

SOURCE (solicitor) - look into my eyes -
 - give a touch on knee, a shoulder, a hand.
 - do it now.

PREPARE YOUR APPROACH - think carefully what words to use, as code words - to strike deep in him.

FEEDBACK - get the prospect to react to your code words - This is only way you know what he is thinking.

C. TECHNIQUES OF SOLICITATION

(4)

↳ Major objections of people to giving money - + how to counter

1. Not interested in ~~charismatic approach~~ to Jewish life -
not religious, intermarried, etc. -
answer - The world considers you Jewish - it's not you who
went after people like you. - Hitler
" - why do Jews have 28% Nobel prize winners;
emphasis on education
2. America first - patriot
answer - universalism; gay complimentary Jew in 67
3. Other commitments - universities, museums, Negroes
4. If war is imminent, why bring Russian immigrants
5. Lack of cash
6. Why doesn't Israel withdraw - and make peace
7. I give to orphanages + yeshivas in Israel
8. I gave last year beyond my capacity
9. Business is bad



29

LONDON DISTRICT SYMPOSIUM - SUNDAY, 13TH OCTOBER, 1974

TIMETABLE

2.30 p.m.

- Chairman's introduction

2.35 p.m.

- THE IDENTITY OF THE DIASPORA WITH ISRAEL

- what has the Yom Kippur War meant to world Jewry
- why does World Jewry need Israel
- Israel's survival for whom
- the Jewish identity of Israel
- the significance of the Israel- Diaspora relationship

2.55 p.m.

- Discussion

3.20 p.m.

- ISRAEL TODAY

- the cost of the War
- the defence budget
- the Israel National Debt
- the cost of immigration and absorption
- the cost of health, education and social welfare
- the Jewish Agency budget
- the responsibility of the Diaspora

3.45 p.m.

- Discussion

4.10 p.m.

- Tea

4.20 p.m.

- CANVASSING TECHNIQUES

- (a) The Assessment
 - how to determine the assessment
 - who makes the assessment
 - self assessment as the first step
- (b) Personal Canvassing
 - when does personal canvassing begin
 - who are the targets
 - how to choose the canvassers; what is the best team
- (c) The Appointment
 - how to make the appointment
 - the meeting place
- (d) Canvassing Techniques
 - how to begin
 - how to present the case
 - the help of an outside personality e.g. an Israeli
 - the objections from the prospect

CONFIDENCE
vs. MOOD OF DEPRESSION
YOU CAN DO IT - CHIN UP

(2)

- overcoming these objections
- when and how to close

SECURING THE GIFT

(a) Maximising the Gift

- personal deeds of covenant
- gift of personal assets, works of art, property, quoted securities
- company deeds of covenant
- provision of professional advice

(b) Redemption of the Pledge

- the acknowledgement of the pledge
- when to ask for payment
- who to ask for payment
- how to ask for payment

(c) The Records

- the record card
- informing Rex House of the 1975 pledge
- recording the pledge
- the receipt for the contribution
- covenant forms
- the computer and information collection

- Questions and Discussion

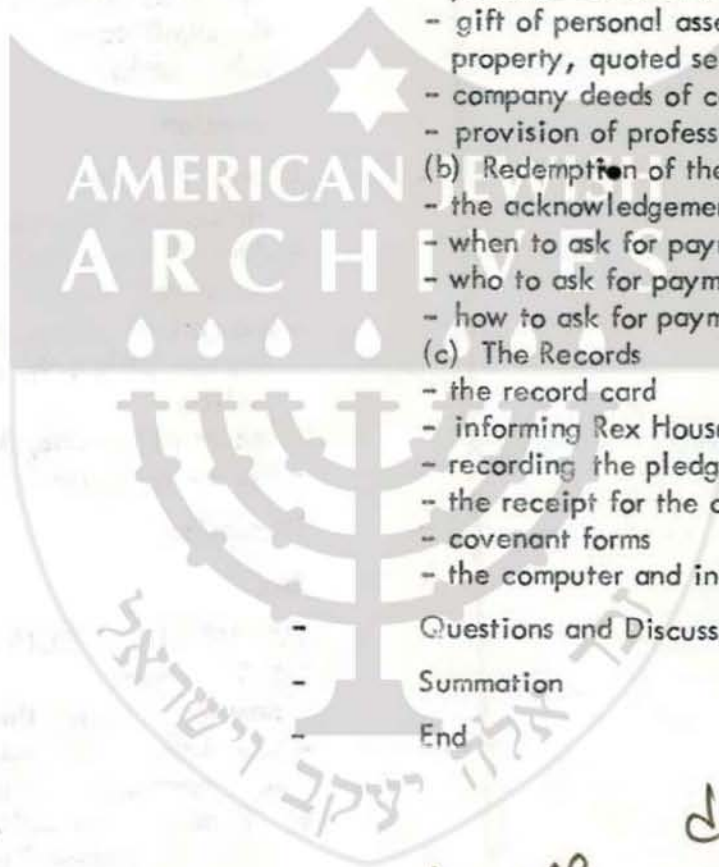
- Summation

- End

4.50 p.m.

6.15 p.m.

6.30 p.m.



1974

60,000

donations

$\frac{1}{2}\%$ give
next 8%

 $8\frac{1}{2}\%$

48% - more than 10,000
32 " " 1,000

80%

pre-war 1933 figures

1. WHAT DID WE DO IN LAST CAMPAIGN
(make a profile -) of gifts obtained
2. WHERE DO WE WANT TO GO?
(make another profile) of gifts needed
3. CALL ONE-DAY RETREAT OR INSTITUTE OF TOP LEADERSHIP -
50 or 75 people, at most.
4. HOW DO WE GET FROM 4 mill to 6 mill.?
HOW MANY GIFTS IN EACH CATEGORY DO WE NEED?
~~HOW MANY WORKERS~~ (Draw up actual lists -
and upgrades, in general)
5. HOW MANY WORKERS DO WE NEED?
6. RECRUIT & TRAIN THEM.

TEN RULES FOR INDIVIDUAL CANVASSING

1. Rate the prospect
2. Meet with him in person
3. Ask for the specific amount
4. Explain the reasons why
5. Answer his questions
6. Try to obtain a definite reply on the spot
7. Settle if you are satisfied
8. Go back again if you are not satisfied
9. Call another team if necessary
10. Send him a thank-you note

AMERICAN JEWISH ARCHIVES

from Herbert A. Friedman

H

PHILOSOPHY OF SOLICITATION

1. $\gamma \gamma \beta \gamma$ - hand out
2. $\gamma \gamma \beta \beta$ - just contribution
3. $\gamma N / \gamma X$ - contribution - building of buildings

all these are philanthropy - old USA

4. $\gamma \beta \alpha \gamma$ - ON tax, $1/10$
This is basis of Operation Breakthrough

if its taxation - then:

1. we have the right to know how much the prospect ~~has~~ has, all about him.
2. the right to assess, to size up, to rate.
3. use the word: you owe no - taxes are owed.

if you live beyond your means; give beyond your means.
borrow for Israel - based on high net worth
salesmanship requires the enthusiasm of contagion.

B. PSYCHOLOGY OF SOLICITATION

(2)

I. Stages in development

- ① SUSPECT - a candidate
learn what he has; and what he gives
If he has more than what he gives, he is an
- ② EXPECT. This becomes the working list.
- ③ a PROSPECT is a person about whom you
know enough, so that you will go to see him.
You must have ④ ENTREE - it is of importance who
brings you in.
- ⑤ CONDITIONS - where to see him; office is most.
- ⑥ WHO DOES THE SOLICITATION
- ⑦ Then he becomes a DONOR
- ⑧ After that he must become a WORKER

II. GETTING THE FACTS SO THAT YOU KNOW YOUR PRODUCT - BETTER THAN YOUR PROSPECT, WHO BUILDS A SELF-DEFENSE MECHANISM

Don't talk 15 minutes. Let customer talk from
the beginning. He has previous facts + knowledge -
let him reveal himself - then you can
answer him.

He also has previous opinions - let him reveal them.
He also has psychological prejudices - let him air them.
(he hates the community, or work, or the chairman)

Give him new facts; new opinions; new emotions. You
must get him to change.

III. Know background of man - is he golfer, orthodox, liberal, etc., etc. Find out his personality - especially what type of group he belongs to - for he will usually react as his group does.

SEVEN RULES FOR CAMPAIGNING

1. Money flows from emotional commitment and intellectual belief.
2. Commitment and belief flow from the following set of basic principles:
 - a) The Jewish people is one and united.
 - b) Every Jew is responsible for every other Jew.
 - c) The survival of the Jewish people is indispensable, for Jews and for mankind at large.
 - d) The two strongest tools with which to guarantee survival are education and immigration.
 - e) Israel stands at the center of both efforts.
 - f) Therefore newly sovereign Israel deserves our strongest possible support.
3. Commitment and belief without leadership are not sufficient.
4. Leaders are of two types: born and trained. The natural born will automatically appear; the others must be searched out, persuaded to enter the campaign, and trained. New generations of leaders must be sought constantly, in a never-ending process.
5. Overall plans, including goals, dates, slogans, emissaries, missions and many other items, must be precise, specific and prepared almost a year in advance; they must be kept flexible to accommodate to political, economic or military changes in the environment.
6. Canvassing rules must be learned by everyone in the entire organization - and followed as closely as possible. Pre-canvass every important gift at every level of the campaign.
7. High morale emanates from the top of the hierarchy, and moves laterally throughout the entire lay and professional committees and structures. It is maintained by example of hard work, truthful explanations of every immediate situation, and generous praise for effort.

Talking to you as Executive + Cabinet.

1. Campaign is not a luxury exercise - but is at core of our survival.

In the search for money, you rally the Jewish people. It is more than money. It is morale. The campaign must be hot - white-hot - passionate.

2. Money comes from commitment. Commitment comes from knowledge. You must teach - persuade - convince; that Israel is the center of our existence. And cost of maintaining it

3. ~~is high~~ - 55,000 per immigrant family
32,000 per soldier per year

3. Analysis of your campaign:
 - give figures
 - face-setting is the problem
 - Keep open mind
 - fixed ideas must be changed

Be more aggressive

Reach ~~the~~ into areas which you haven't penetrated ^{yet}

Develop a cadre - in line

Your young people are developing fine

Your targets:

FIND NEW LEADERS - MOTIVATE

RAISE YOUR LEVELS

SATURATE YOUR COMMUNITY WITH EDUCATION



"Do's and Don'ts" for Campaign Chairmen

1. All workers must make their own commitments before they undertake to solicit anyone else.
2. Rating prospects is indispensable for upgrading.
3. Every fund raising function must have adequate pre-solicitation of the key gifts.
4. Don't spend your time on meaningless meetings. Make sure every meeting you attend has some value in it.
5. Compress campaign, from opening dinner to victory celebration, into as brief a time as possible.
6. Use double teams on important solicitations.
7. Use national leadership resources where you think it can be helpful.
8. Take 3 or 4 key people overseas on a quick survey trip, returning on the eve of the campaign with first-hand knowledge.
9. Carefully analyze each level of giving to see where the best increases can be achieved.
10. If the stock market should turn up, take full advantage of the "bargain sale" opportunity.
11. Keep constant contact with your workers handling the top cards. Your personal follow-up will prevent cards from sitting in somebody's pocket.

Should We List Names of Contributors?

By SOLOMON B. FREEHOF
ARCHIVES

Condensed from JEWISH FEDERATION NEWS

This question of recording the name of the donor of a gift for charity has been widely debated in recent years. Those who favor the practice say that a man is entitled to the pride that comes to him when it becomes known that he has been generous in a good cause.

Also, mentioning the name of one donor encourages other donors to equal or to surpass his gift. Those

Dr. Freehof, rabbi-emeritus of Temple Rodef Shalom, Pittsburgh, is widely known as an authority on the Responsa.

who oppose the practice say that if a man gives only a small amount to a certain cause this is primarily his own affair and he should not be embarrassed by having the small amount permanently recorded.

Because these opposite arguments each have weight, the practice as to permanently recording names varies from community to community.

Is there a preference in this matter to be found in Jewish legal tradition?

A direct opinion can hardly be found in the tradition, because the present method of conducting drives is only a modern development. In

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earlier times they did not use our present method of audible auction to raise money for charity, though in one way there was something like it. For centuries the traditional synagogue was maintained by especially generous gifts, given on the various holidays. These gifts were for the purpose of securing the privilege of being called to the Torah, or participating in one way or another with the Torah ritual.

The amount of the gift was actually determined by competitive bidding in the service itself, and the names of the donors, the successful ones and those who were outbidden, were all, of course, announced aloud in the synagogue.

As far as I know, the names of these donors were not permanently recorded, but certainly they were publicly announced.

As for more permanent acknowledgement of gifts, we do have traditional opinions which are not only mentioned by various authors, but are recorded as actual law in the Codes. The raising of money in our present form for charity did not—could not—record itself in literature, but what did record itself is close enough to our present charitable drives to be quite relevant to the question.

Owing to the endless persecutions and expulsions, the central communal need was the rebuilding and refurbishing of the synagogues. With regard to that constant communal task there is the following discussion:

If a man gives a Menorah, a Torah cover, or other gift to the synagogue, should he have his name recorded on it or not? The classic discussion of this question goes back to the thirteenth century to Rabbi Solomon ben Aderet in Barcelona, Spain, the great Spanish authority.

He says that there are both Biblical and Talmudic precedents for recording the names of the donors. The Torah itself mentions the names of the benefactors in connection with their good deeds. Thus, Reuben is mentioned for his deliverance of his brother Joseph; and Boaz, in Bethlehem, is likewise mentioned.

As for the Talmud, says Solomon ben Aderet, there is in Baba Bathra 133b, a clear record on the gifts to the Temple of Yosef ben Yoezer and his son for their separate gifts.

So, concluded the Spanish authority (this is in his Responsa, 582,) it is proper to record the names of those who give gifts to the sanctuary, that they may have due memorial for their good deed, and also to open the door wide for other givers.

This opinion of Solomon ben Aderet is repeated by many later authorities, as for example, Mendel of Nicolsburg, in the eighteenth century ("Zemach Zedek", 52), and others.

Finally, this is recorded in a rather remarkable way in the Schulchan Aruch, the official law code (Yore Deah 249: 13), especially in the note of Moses Isserles Kracow, sixteenth century.

He says: "While it is a sin to boast of one's good deeds, nevertheless, it is proper to record the name of a donor on his gift, first, in order that this public record may prevent the gift's being misapplied to another purpose unintended by the giver, and second, that it should be a memorial for him."

From all of the above we can come to a clear conclusion as to the spirit of Jewish tradition on the matter of recording the names of donors. If the purpose of announcing and recording

the gift is merely boastful vanity, then to record the name is actually a sin (as Isserles said); but if it is for the purpose of *safeguarding* the gift, that it should not be misused for purposes unintended by the donor, or certainly, if for the more important purpose of *encouraging* other givers, then we should record the names, following the opinion of the great Spanish authority, Solomon ben Aderet, and thus, as he said, "open the door to other doers of good deeds."

MAIMONIDES' EIGHT STAGES OF CHARITY

1. *He who gives grudgingly.*
 2. *He who gives cheerfully but not enough.*
 3. *He who gives a sufficient sum but is asked.*
 4. *He who gives before being asked, but directly to the poor man.*
 5. *He who gives so that the poor knows from whom he takes, but the giver knows not the recipient.*
 6. *He who gives so that the giver knows to whom he gives, but the recipient knows not the giver.*
 7. *He who gives so that the giver knows not to whom he gives, nor does the recipient know from whom he receives.*
 8. *The highest form: He who strengthens the hand of the poor by giving him a loan, or joining him in partnership, or finding him work.*
-

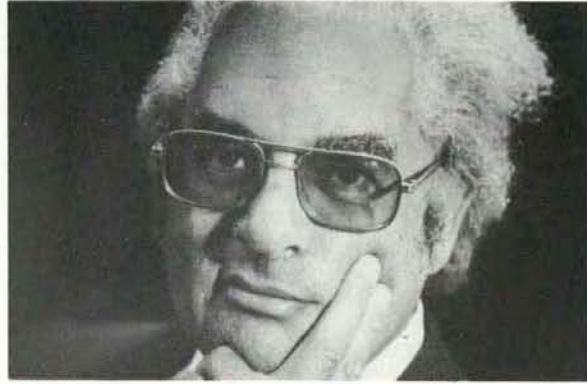
JIA'75 Campaign

Leadership Symposium

Purpose

To provide
JIA Leaders
with the necessary
knowledge and skills
for leadership
of the 1975
Campaign.





Rabbi Herb Friedman

Often called "the fund-raiser extraordinary", Herb Friedman was formerly the executive Vice-Chairman of the UJA, and is no stranger to this country. Three years ago he was instrumental in introducing the concept of face-to-face canvassing – a Campaign philosophy which revolutionised fund-raising in the United Kingdom.

Herb Friedman enjoyed a distinguished academic career in the United States, graduating from Yale and Columbia as well as The Jewish Institute of Religion. He was ordained Rabbi at the beginning of 1944, and later served as Chaplain with the U.S. Forces in Germany.

In 1952, he accepted the post of Minister with Congregation Emanuel, in Milwaukee, Wisconsin. He remained there until 1955, when he joined the UJA as its Chief Executive Officer. For 18 years Herb Friedman was the guiding force behind the largest fund-raising organisation for Israel in the world, developing its machinery and presenting to the largest Jewish community on earth the needs of Israel.

In 1971, he migrated to Israel with his family and now lives in Jerusalem and Caesarea. Settlement in Israel with his family represents the fulfilment of a lifetime commitment to the survival of the Jewish people and the development of the Jewish State. He is now a Director of the World Liberal Jewish Movement.

- who are your targets.
- how to choose the canvassers;
what is the best team.

III The Appointment

- how to make the appointment.
- the meeting place.

IV Canvassing Techniques

- how to begin.
- how to present the case.
- the help of an outside personality e.g. an Israeli.
- the objections from the prospect.
- overcoming these objections.
- when to close.
- how to close.

Securing the Gift JEWISH

Aim: To review the methods of increasing the value of the pledge, securing the gift and the importance of maintaining records as a key to a successful campaign.

I Maximising the Gift

- Personal Deeds of Covenant.
- Gift of personal assets, works of art, property, quoted securities.
- Company Deeds of Covenant.
- Provision of professional advice.

II Redemption of the Pledge

- the acknowledgement of the pledge.
- when to ask for payment.
- who to ask for payment.
- how to ask for payment.

III The Records

- the record card.
- informing Rex House of the 1975 pledge.
- recording the pledge.
- the receipt for the contribution.
- Covenant forms.
- the Computer and information collection.

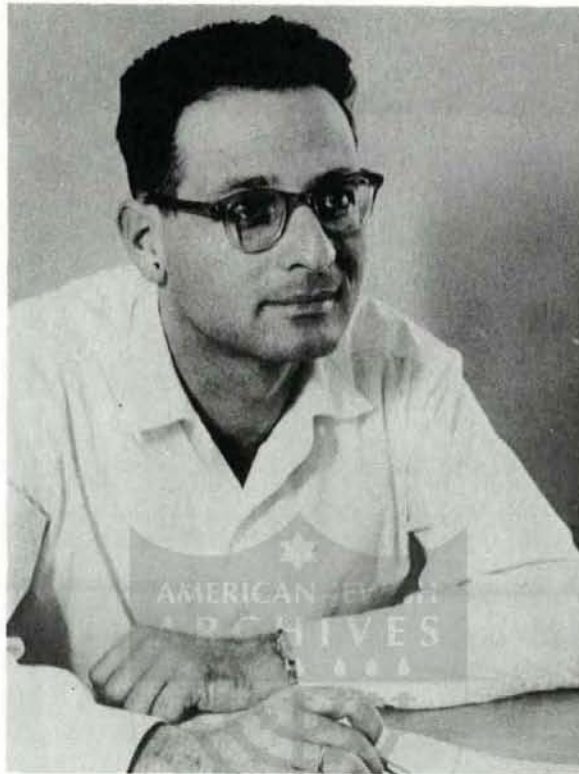


"No campaign can be taken in isolation. The next campaign and the responsibilities of leadership represent a considerable challenge. To succeed, we need your support and participation."

Michael M Sacher
JIA Chairman



JIA
Rex House, 4-12 Regent Street
London SW1Y 4PG



Michael Shashar

Michael Shashar, *until recently Consul of Israel in New York* (1971-1973), served as spokesman for the military administration of the West Bank of Jordan and as press attaché to General Moshe Dayan, Israel's Defense Minister, from the Six-Day War – in June 1967 – until 1971. In this capacity he met with many prominent politicians, clergymen, journalists and writers, who came to the Middle East to obtain an insight into both Israel's and the Arab countries' problems. He also made personal acquaintance with many of the Arab political leaders in the territories under Israeli control since 1967.

Mr. Shashar is fluent in Hebrew, Arabic, French, German and Yiddish, as well as English. He is familiar with the literature dealing with the problems of the Middle East, in addition to the first-hand information which he gathered in the field.

Mr. Shashar is a journalist and writer by profession. He is the author of three books: "An Israeli in Moscow", reminiscences of a tour in the Soviet Union; "Between Book and Border"; diary of a kibbutz member; "Europe"; a tourist guide for Israelis. He is currently working on his fourth book, dealing with the new relationship between Israelis and Arabs.

As a journalist, Michael Shashar worked with the Israeli Broadcasting Service (1960 - 1962), served as a parliamentary correspondent for the Hebrew daily "Hatsofe" (1962 - 1964), and was assistant editor of the weekly magazine of the "Haaretz" daily - often referred to as "the Israeli New York Times" - (1964-1966).

His articles, on a wide range of subjects, have been published in English, Hebrew, German, French, Spanish, Yiddish, Danish, Russian and Polish.

Mr. Shashar was born in 1933, in Berlin, Germany and emigrated with his parents to what was then Palestine in 1935. He received his education in Jerusalem and in other parts of Israel. He is a graduate of a talmudic academy and of the Hebrew University of Jerusalem, and holds a doctorate degree from the NY University, where he majored in Judaic studies. During the years 1950-58, he served on a public service mission in Switzerland, France and Germany.

Twice, in 1960 and 1970, Mr. Shashar went on a coast-to-coast lecture tour of campuses in the US, lecturing mainly on the Middle East and Soviet Jewry. His appearances received wide TV, radio and press coverage.

Michael Shashar lives currently in Jerusalem, is married and has four children.

The 1975 JIA Campaign

**Statement from the
Deputy Chairman,
Trevor E Chinn**



Since the Yom Kippur War it has become clear that World Jewry will have to accept a target for fund-raising of not less than our recent global campaign, if Israel is to carry on with the urgent tasks of immigration and "bridging the gap". In this, the JIA will be called upon to play a decisive role.

It is essential, therefore, that we plan now and prepare our leadership for what will be, without doubt, an arduous '75 appeal. We must provide our key workers with the necessary knowledge and skills for leadership. To this end we have devised a programme of Leadership Symposia which will afford every JIA leader the opportunity to acquire the expertise to "let our people know" of their responsibilities during 1975 and the years to come.

First Session

Israel and the Diaspora

Aim: To discuss the change in the relationship between Israel and the Diaspora since the Yom Kippur War and to review the needs for funds to meet the costs of immigration, education and social welfare programmes in Israel.

I The Identity of the Diaspora with Israel

- What has the Yom Kippur War meant to world Jewry?
- Why does world Jewry need Israel?
- Israel's survival for whom?
- The Jewish identity of Israel.
- The significance for the Israel-Diaspora relationship.

II Israel Today

- the cost of war.
- the defence budget.
- the Israel national debt.
- the cost of immigration and absorption.
- the cost of health, education and social welfare.
- the Jewish Agency budget.
- the responsibility of the Diaspora.

Second Session

Canvassing Techniques

Aim: To investigate methods of obtaining the highest possible contributions from the Anglo Jewish community based on an approach to potential contributors through districts and trades and professional affinity groups.

I The Assessment

- how to determine the assessment.
- who makes the assessment.
- self assessment as the first step.

II Personal Canvassing

- When does personal canvassing begin.

Memorandum

United Jewish Appeal Federation of Jewish Philanthropies Campaign

130 East 59th Street • New York, New York 10022 • (212) 980-1000

TO Herbert Friedman

DATE December 7, 1981

FROM David Edell

SUBJECT Discussion on Solicitation - Chairmen's Mission

This is a synopsis of our discussion regarding the elements which we wanted to include in the seminar on solicitation:

1. Clarifying the Issues

What is UJA all about (state building, etc.)

Why do we do what we do (discussion)

Ten facts to use in solicitation

2. Discussion on how people feel when soliciting for UJA

The goal of the discussion is to get them to express their feelings, for you to address their feelings, and to present the mind set of confidence and pride.

3. Why face to face solicitation.

What impact it can have on the overall Campaign and their Division Campaigns. It will be important to use specific goals such as if each member of the Executive Committee were solicited face to face, the kind of residual impact that would have on their solicitations.

4. Ratings

How one assesses how much one should give himself.

We must deal with the whole area of how one assesses how much one should ask another person.

What right does one have to ask someone for a specific gift.

I would recommend playing a rating game by creating a factitious profile and asking people to write down a recommended gift.

5. The Solicitation Process

How does one get an appointment

How does one open the discussion

The concept of holding to the rated figure

The concept of putting the figure on the table early

6. Turn Arounds

Asking the group what they think responses will be to this approach and then engaging them in discussion on how to deal with those issues within the context of a solicitation.

7. Role Playing

This is a random outline of my recollections. Let's flesh it out again soon.

Looking forward to this whole experience.



Saver

Memorandum

United Jewish Appeal  Federation of Jewish Philanthropies Campaign

130 East 59th Street • New York, New York 10022 • (212) 980-1000

TO HERBERT FRIEDMAN

DATE DECEMBER 31, 1981

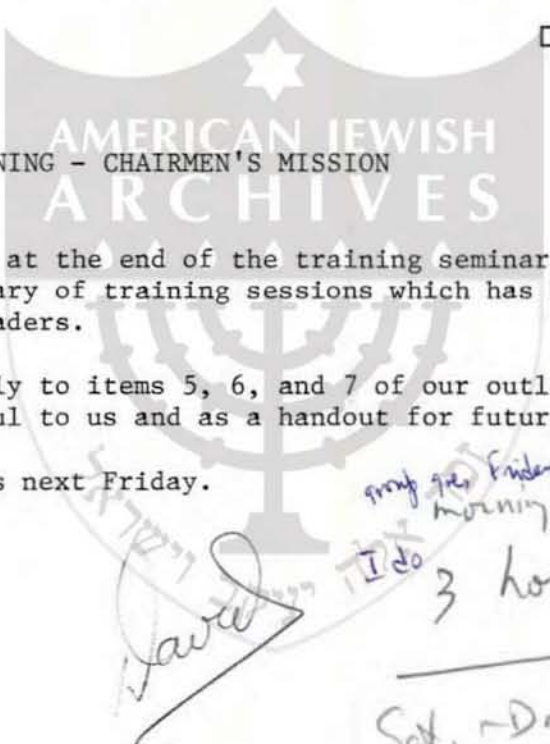
FROM DAVID EDELL

SUBJECT SOLICITATION TRAINING - CHAIRMEN'S MISSION

I will distribute at the end of the training seminar the enclosed sheet. It is a good summary of training sessions which has been well received by many of our leaders.

It relates directly to items 5, 6, and 7 of our outline (my 12/7/81 memo) and is useful to us and as a handout for future reference.

Let's discuss this next Friday.



*3 bright young guys
social
service
believe in
Israel*
*my 1st Friday
morning on JDC visits*
I do 3 hours Friday afternoon

David

*Sat. - David will do it
I should sit in + listen.
1) Volunteers - how successful business men
allow efficiency in volunteer org.
2) Motivation - people's needs in org
3) Implications for leaders
4) Questionnaire to define leadership style*

*5) Our expectations of chairmen
6) Campaign planning guide*



Allied Jewish Federation of Denver 1983 Campaign/ Israel Special Fund

1983 Campaign Cabinet

October 12, 1982

General Campaign Chairman
Charlene Loup

President Allied Jewish Federation
Ralph Auerbach

Project Renewal Chairman
Howard Greinetz

Campaign Advisors
Gary Antonoff
Ralph Auerbach
Charlie Goldberg
Jack Grazi
Robert Loup
Warren Toltz
Phil Winn

Women's Division Chair
Jane E. Rosenbaum

Campaign Cabinet
Dirk Aardsma
Carol Antonoff
Gary Antonoff
Irv Ash
Ralph Auerbach
Mike Bloom
Norman Brownstein
Robyn Berenstein
Jerry Carr
Dr. Sol Cersonsky
H. Paul Cohen
Selma Cohen
Warren Cohen
Joel Edelman
Steve Farber
Faye Gardenswartz
David Gitlitz
Charlie Goldberg
Rabbi Daniel Goldberger
Jack Grazi
Howard Greinetz
Kathy Fine-Heidtbrink
Gloria Husney
Steve Kippur
Derril Kripke
Norm Kripke
Al Lackner
Bob Loup
Sharon Marks
Cheri Michelson
Larry Mizel
Mike Morris
Joe Pells
Sam Reinstein
Jane E. Rosenbaum
Judy Robins
Claire Seiden
Jack Shapiro
Barbara Sidon
Larry Seigel
Carol Sobel
Nancy Stone
Ruth Toltz
Warren Toltz
Elly Valas
Phil Winn

Executive Director
Harold Cohen

Assistant Director
Alan Engel

Rabbi Herbert Friedman
United Jewish Appeal, Inc.
1290 Ave. of the Americas
New York, N. Y. 10019

Dear Herb:

I just wanted to say again what a pleasure it was to meet you and to thank you for your thoughts and suggestions on professionalism and Campaign (By the way, Webster 1973 offers a non-military definition of Campaign. "A connected series of operations designed to bring about a particular result."). During the past hectic months my enthusiasm had been sinking and I was beginning to feel discouraged. The few hours we spent together and the application of your suggestions this past week have revived me.

Your suggestion of a fundraising school is a very good and necessary idea. You are right, most schools of social work don't adequately address the subject and often confuse fundraising with grant writing. Good fundraising requires an appreciation of the underlying principles involved. I've enclosed a copy of my 1980 research paper which reviews some of the best literature on fundraising. Also enclosed is an outline of a fundraising seminar I gave at Denver University's School of Social Work.

I look forward to seeing you again soon.

Sincerely,

Gary Siepser
Assistant Campaign Director

GS:mjb
Encls.

FUND-RAISING SEMINAR

May 24, 1982

I. WHO'S HERE

1. NAME
2. AREA OF PRACTICE
3. AGENCY OR FIELD PLACEMENT
4. WHAT YOU WANT TO KNOW ABOUT FUND-RAISING

II. CAN'T TEACH YOU HOW TO BE FUND-RAISERS IN ONE EVENING - HOPE I CAN SHOW YOU HOW TO THINK ABOUT & EVALUATE FUND-RAISING.

III. WHAT'S BAD ABOUT FUND-RAISING

1. ASKING FOR MONEY
2. DISTRACTS FROM THE "REAL WORK" OF THE AGENCY
3. HARD WORK

IV. WHY FUND-RAISING IS IMPORTANT

1. GOLDEN RULE
2. BUILDS COMMITMENT TO ORGANIZATION - CREATES A SENSE OF OWNERSHIP -
EX: "NEIGHBORHOOD PLAYGROUND " VS " PUBLIC PLAYGROUND"
3. HISTORIC EXAMPLES
 - a. EARLY CHURCH
 - b. LABOR UNIONS
 - c. A.C.O.R.N.
3. KEEPS ORGANIZATION RELEVANT - IF PEOPLE WON'T SUPPORT IT THAN THE MARKET PLACE IS TELLING YOU SOMETHING:
EX.: MARCH OF DIMES

4. Important for women

V. FUNDRAISING CAMPAIGNS DEFINED

1. FOR A SPECIFIC PROJECT OR AGENCY
2. RUN ON A SCHEDULE WITH DEADLINES & QUOTAS
3. PROSPECTS ARE RATED & SOLICITED FOR TARGET GIFTS
4. VOLUNTEER SOLICITORS - WELL TRAINED & INFORMED

VI. BEFORE STARTING

A. ARE THE ORGANIZERS PREPARED TO MAKE A SIGNIFICANT FINANCIAL CONTRIBUTION TO REALIZE THE PROJECT? - *The reverend & the parish*

B. FEASIBILITY

1. ARE PUBLIC OR OTHER FUNDS AVAILABLE WITH A TOLERABLE NUMBER OF STRINGS ATTACHED
2. ARE OTHER ORGANIZATIONS PERFORMING A SIMILAR SERVICE
3. NATIONAL ORGANIZATION PROVIDING SERVICE BUT NOT IN COMMUNITY
4. HOW HAVE OTHER SIMILAR CAMPAIGNS DONE IN ARFA.

C. MAKING A CASE

1. STATEMENT OF FACTS & LOGIC IN SUPPORT OF APPEAL
2. FROM GENERAL TO PRACTICAL & SPECIFIC
3. TIMELY, PRACTICAL & SOUND
4. URGENT
5. DEMONSTRATE AGENCY'S COMPETENCE & PAST RECORD
6. STATE SPECIFIC OBJECTIVE INCLUDING DOLLARS NEEDED
7. INDICATE WHO IS TO GIVE & HOW
8. CONSTRUCT AN EXAMPLE

D. ADMINISTRATION

1. A CAMPAIGN IS A BUSINESS AND YOU BETTER BE ABLE TO ACCOUNT FOR EVERY DOLLAR RAISED AND SPENT
2. RECORD KEEPING
 - a. NON-FISCAL - CONTRIBUTORS & PROSPECTS, PLEDGE CARDS, WORKER ASSIGNMENTS, WORKER INFORMATION, CALENDAR WITH DEADLINES
 - b. FISCAL - PLEDGES & COLLECTIONS, ACKNOWLEDGEMENTS OF CONTRIBUTIONS & BILLINGS
 - c. STATISTICS - GOAL: TO COMPARE PERFORMANCE OVERTIME
 1. WEEKLY ANALYSIS OF PROGRESS
 2. AMOUNTS RAISED
 3. NUMBER OF CONTRIBUTORS
 4. AMOUNTS OUTSTANDING
3. MAILINGS
 - A. RULE OF MAIL: IT TAKES TWICE AS LONG AS YOU THINK IT SHOULD, THEREFORE, PLAN AHEAD
 - B. Hire an expert Ex A J F. + A B data
 - C. Check book giving
4. STAFF
 - A. PARTNERSHIP

VII. STARTING

A. LEADERSHIP

1. BEST WHEN FROM WITHIN ORGANIZATION AND CAME UP THROUGH THE RANKS. EX: MARRIOTT
2. WARNER (1975) CAN GIVE, COMMUNITY INFLUENCE, WELL-LIKED, GENEROUS, FEARLESS, CAN SPEAK WELL, AND A TRUE BELIEVER
3. NEED TO TRAIN & DEVELOP CAMPAIGN LEADERS

B. CAMPAIGN GOAL

1. PEOPLE TEND TO BE GOAL ORIENTED
2. 3 POINTS TO PONDER
 - a. COMMUNITY ATTITUDE TOWARDS ORGANIZATION
 - b. ECONOMIC CLIMATE
 - c. HOW WORTHY IS YOUR CASE

3. GOAL SHOULD BE DETERMINED BY THOSE WHO WILL FULFILL IT - BASED ON ACCURATE INFORMATION & FELT OBLIGATION
4. LOW GOAL
 - a. INSURES SUCCESS & GOOD FEELINGS
 - b. LESS MONEY BUYS LESS SERVICE
5. HIGH GOAL
 - a. MOTIVATES PEOPLE TO GIVE MORE
 - b. PERCEPTION OF FAILURE IF NOT ACHIEVED, RISKY FOR NEW CAMPAIGN
 - c. MAY FRIGHTEN OFF LEADERSHIP
6. ACTUAL GOAL
 - a. REALISTIC & ACHIEVABLE
 - b. RISK OF FAILURE
 - c. REDUCES VALUE OF "WINDFALL" CONTRIBUTION
7. NO GOAL
 - a. FAILURE IMPOSSIBLE - GOOD FOR NEW CAMPAIGN
 - b. DON'T KNOW WHEN ACHIEVEMENT IS COMMENDABLE
8. PERCENTAGE APPROACH
 - a. PAST PERFORMANCE BEST INDICATION OF POTENTIAL
 - b. WARNER'S FORMULA : LEADERSHIP PLUS TOP TEN OUTSIDERS EQUALS 1/3 OF POTENTIAL
 - c. SEYMOUR'S FORMULA: LEADERSHIP EQUALS 15% OF POTENTIAL

C. PUBLICITY

1. PUBLICITY ONLY CREATES AN ATMOSPHERE FAVORABLE TO THE CAUSE. PEOPLE GIVE TO PEOPLE AND ONLY WHEN THEY ARE ASKED.
2. MAJOR CONSIDERATIONS
 - a. ORGANIZATION MUST BE ABLE TO RESPOND TO EFFECTS.
EX: SOMEBODY TO ANSWER THE PHONE, A PLACE TO USE VOLUNTEERS
 - b. TAILOR TO UNIQUE FEATURES OF COMMUNITY
EX: AURORA SENTINAL VS UP THE CREEK READERS
 - c. SOME PUBLICITY ABOUT THE VOLUNTEERS - A THANK-YOU THAT BRINGS IN MORE VOLUNTEERS
3. NEED FOR "PERSONALIZATION" - NEEDS TO BE DIRECTED AT "YOU PERSONALLY"

D. CAMPAIGN CALENDAR

- a. CAMPAIGNS ARE BEST WHEN TIME LIMITED
- b. PEOPLE GENERALLY WAIT TILL THE LAST MINUTE
- c. ESTABLISH CALENDAR EARLY & STICK TO IT.

VIII. CAMPAIGNING

A. WORKERS

1. THE MORE THE BETTER
2. HIERARCHICAL ARRANGEMENT WITH A CLEAR LINE OF RESPONSIBILITY
3. SOURCE OF CAMPAIGN & ORGANIZATION LEADERSHIP
4. MUST BE CONTRIBUTORS

B. WORKER TRAINING

1. WHYS & WHATS OF CAUSE AND ORGANIZATION
 - a. NEEDS EXPRESSED IN HUMAN TERMS
 - b. SITE VISITS
2. TECHNIQUES OF SOLICITATION

- a. PRESENTING THE CASE, CLOSING, OBJECTIONS
- b. ROLL PLAY & VIDEO TAPE

C. RATING PROSPECTS

- a. MOST VALUABLE INFORMATION FROM WORKERS WHO HAVE CONTACT WITH PROSPECTS
- b. PAST CONTRIBUTIONS TO CAMPAIGN
- c. PUBLIC SOURCES

D. ASSIGNMENT

- a. BEST SOLICITOR FOR EACH PROSPECT
- b. EQUIVALENCY OF GIFT
- c. TEAM APPROACH

E. SOLICITATION

- a. FACE-TO-FACE MOST PRODUCTIVE
- b. "SOLICITOR TRUST" DEMONSTRATED BY SOLICITORS CONTRIBUTION
- c. PERCEIVED CRISIS - PEOPLE EAT EVERY DAY NOT IN THE LONG RUN
- d. SPECIFICITY OF REQUEST - ASK FOR THE KITCHEN SINK WHICH COSTS X DOLLARS
- e. TAX IMPLICATIONS - *refer to sheet*
- f. OTHER TECHNIQUES
 - a. DINNER OR PARLOR MEETINGS
 1. ROOM MUST BE FILLED
 2. USE OF PEER LEADERSHIP
 - b. SITE VISITS AND MISSIONS
 - c. DOOR-TO-DOOR
 1. BEST WHEN SOLICITOR KNOWN
 2. MAKE SURE YOU HAVE THEIR ATTENTION

IX. CLOSING

A. COLLECTIONS

B. ACKNOWLEDGEMENTS: GENERAL & SPECIAL THANKS FOR NOTEWORTHY GIFTS

C. EVALUATION

1. REVIEW GOALS

2. RESULTS - NEW GIFTS, DOLLARS RAISED
3. BUDGET
4. WORKERS EVALUATION
5. PUBLICITY
6. PROPOSED AND ACUTAL CALENDARS

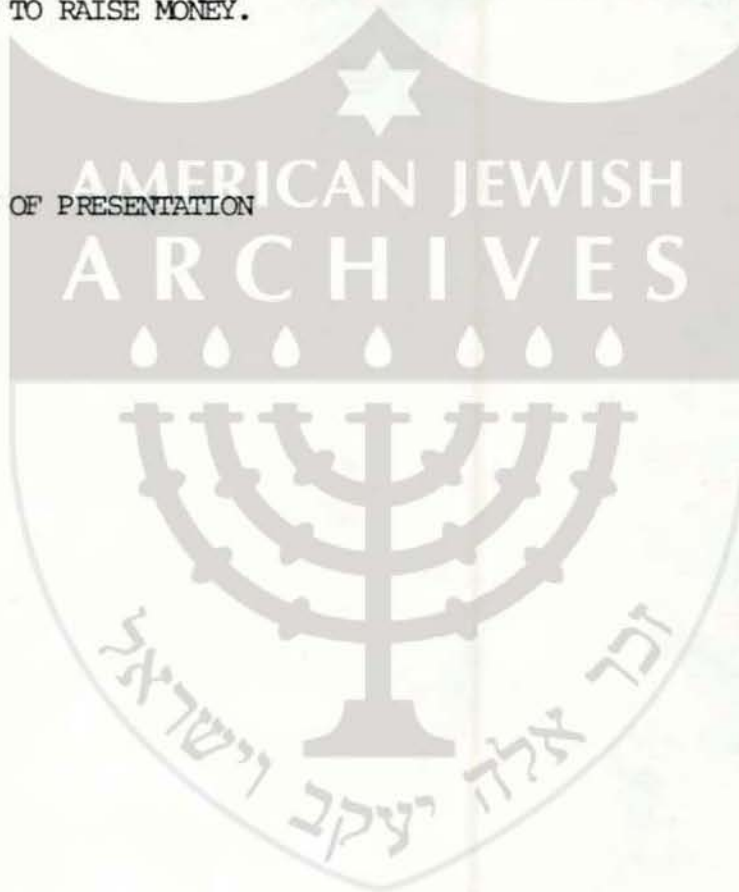
D. RECOGNITION OF VOLUNTEERS

X. WHY FUND-RAISING IMPORTANT?

NOT POSSIBLE TO "DO GOOD" WITHOUT RESOURCES. WE'RE KIDDING OURSELVES IF WE THINK WE CAN CHANGE SOCIETLY WITHOUT HAVING CONTROL OVER OUR AGENCY'S SOURCES AND LEVELS OF INCOME. AS SOCIAL WORKERS - AS AGENTS OF CHANGES, WE BETTER KNOW HOW TO RAISE MONEY.

XI. QUESTIONS

XII. EVALUATION OF PRESENTATION



ORGANIZATION FOR A FUNDRAISING CAMPAIGN

Gary Siepser

Private charities in the United States raise and distribute billions of dollars annually. According to the American Association of Fund-Raising Council, this amounted to over \$43,310,000,000 in 1979. Such charitable organizations serve a redistributive function in our society. It is important that social workers are aware of this "service" and the factors which make it possible. Private social service agencies and concerned citizens must work diligently and creatively to find resources with which to provide the whole range of social services from abortion counseling to zoo outings. In this era of "limited resources" and "balanced budgets", social workers must develop the requisite skills to raise funds in the private sector. This paper is intended as an overview and guide to the methodologies of fund raising.

Fund raising is an essential element in the welfare of many private social service agencies. One such agency that relies heavily on private contributions is the Associated Jewish Charities and Welfare Fund. The three-fold purpose of this article is to determine those factors which most influence an individual's contribution, to develop an outline for campaign organization, and to serve as a reference for the reader.

Fund raising campaigns in general and the AJC campaign in particular are characterized by the following:

1. They are run largely by and for special interest groups, in this case the Jewish community of Baltimore.
2. They finance stated programs.
3. They are run on a schedule with deadlines and quotas.
4. Prospects are classified and solicited for a target gift.
5. Volunteer solicitors are well-informed and trained.

Characteristics 2 through 5 were identified by Seymour (1966) and Hutler (1977) as the generic characteristics of all fund raising campaigns.

BEFORE STARTING

One of the key elements which distinguishes a campaign from other types of fund raising activities is planning. Precampaign planning is crucial and frequently determines the success or failure of the campaign. Both Hutler (1977) and Warner (1975) place considerable emphasis on early planning.

Making a Case:

The "case" is an advocacy statement which summarizes the essential facts and logic in support of an appeal for funds. Some considerations in building a case are:

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1. The case must be humanitarian, wide in scope, and proceed logically from the general to the practical and specific details. A sample case might be: All people should have decent housing...The ABC is mobilizing to provide housing for 500 elderly persons in our community...A 300-unit apartment is needed for this at a cost of \$12,000,000. The appeal: "Will you give X dollars so that our community can provide decent housing?"
2. The case must be timely, practical, and sound.
3. The case must be urgent.
4. The case must demonstrate the institution's competence to render the services to which it is committed.
5. The case should state the past accomplishments of the agency.
6. The case must advance a plan.
7. The case must state specific objectives. This includes the dollar amounts needed.
8. The case must indicate who is expected to give and how.

A well-made case is a logical statement of how one may help and ends with an appeal which gives the donor specifics. Building a strong case is an essential element of early planning. Even well-established campaigns should reappraise their case on a regular basis.

Feasibility Study:

Before investing a significant amount of time, energy, and money in a campaign, one should evaluate the chances of success.* This is particularly important for groups starting out on their first campaign. It is essential to ask the basic questions in the planning stage. The most salient questions: Are the founders prepared to make a significant financial sacrifice to realize this project?

Other aspects of a feasibility study include investigation of the following:

1. the possibility of public or other funds available for the project;
2. other organizations performing similar services;
3. any national organizations that are already providing the proposed service but not in this project's community;
4. the success or failure of the campaigns of groups with similar purposes.

Only after a feasibility study has provided a positive prognosis should the campaign be continued. A good feasibility study is hard work and requires time and energy, but it is a crucial element in a well-planned campaign.

Campaign Administration:

A campaign is a business and must be managed accordingly. From the outset of a new campaign, rudimentary structures to manage and administer

*A discussion of this issue can be found in Warner (1975).

the campaign must be established. Management and administration practices should be reevaluated regularly.

Central to campaign administration is the management of two broad categories of data. The non-fiscal records will include: master files of contributors and prospects, pledge cards, worker assignment sheets, worker information lists, campaign organization chart, and campaign calendar with deadlines. The fiscal records will include: recording and reporting of pledges and collections, acknowledgments to contributors, and billing.

Other areas of campaign administration concern statistics and mailings. Statistics are the measurement tool by which the campaign's progress is determined; they should be prepared for no less frequent than a weekly analysis. The statistics should break the campaign into its most important elements or divisions. Reports should indicate the amounts raised to date, total number of contributors, and the numbers and amounts of those who have yet to contribute. This data will then be available to compare this year's campaign to other years, and, for this reason, counting methods should not be changed unless absolutely necessary.

Mailings are of vital importance; therefore, it is essential to control this operation carefully. All major mailings, publicity, invitations, and reports should be prepared well in advance--in envelopes, stamped, and bundled.*

Staff:

Most ongoing campaigns are staffed by fundraising professionals. In most cases, these people have duties in the organization in addition to fund raising. This is the case in the AJC and similar organizations. There are many different views concerning the responsibility of the staff during a campaign. Both Hutler (1977) and Seymour (1966) devote considerable attention to this subject. On one point they are in clear agreement: the staff-lay relationship should be one of partnership--each learning from the other, growing, and doing a better job as a result. The professional brings certain special skills; the volunteer brings fresh approaches and insight based on a broader, more personal contact with the community. Volunteers at all levels are the heartbeat of the campaign, a fact the staff does well to acknowledge.

STARTING

Once the preliminaries are completed and one is satisfied that a solid case is made and a fund-raising campaign considered feasible, the campaign is ready to begin.

Leadership:

Leadership, and specifically top leadership, is one of the most important factors in the success of a campaign. Warner (1975) and Hutler (1977) have devoted considerable attention to the subject, and each has drawn a profile of top campaign leaders. Hutler emphasizes the preferability of drawing top

*Grubb and Zwick (1977) offer an excellent practical approach to the use of the mails for fund raising.

leaders from within the organization. In a new campaign, this may not always be possible or to the best advantage. Warner's (1975) profile of leadership qualities calls for a person who has wealth and community influence, and is well-liked, generous, and fearless. He or she should be a "true-believer" in the project and a good speaker who is also well-organized.

Needless to say, the person embodying all these characteristics is a rarity. Even when such a person can be found, it may not be possible to depend on his or her services year after year, so in ongoing campaigns, compromises must be made in leadership selection. When leaders are brought up through the ranks it is possible to help an individual cultivate and improve weaker areas; their advantage to the campaign is their availability.

Whether the campaign chairpersons or other leaders are chosen from within or without the organization, it is worth the time and trouble to get the person with the right qualities for the job. Top leadership should be planned for beginning on "day one" and should not be assigned merely in order to fill slots on an organizational chart. Warner (1975, p. 25), emphasizing the importance of good leadership, notes whimsically, "If you find him, protect him. Be sure he stays out of drafts and takes his vitamin pills."

Setting the Campaign Goal:

Many people are goal-oriented and tend to work better and harder when they have an objective. Goal-setting in a campaign is usually a compromise between what is needed and what fund raisers think they can do. There are a number of points to be taken into consideration by campaign leadership when setting goals. Hutler (1977) indicates that foremost is the amount of money that has been raised previously; in other words, past performance is the best indicator of future potential. Additionally, the community's attitude toward the organization and the economic climate are important factors. There should be, finally, a careful consideration of the campaign's "case". Is the relative merit of the cause so good that it deserves a sizeable portion of the community's charitable resources?

The campaign goal should be determined with input from a wide range of individuals including key contributors. This not only helps assure that the goal is based on accurate information, but also places the contributors under some obligation to see that the campaign succeeds.

Four different goals are described by Warner (1975, p. 36); each type has advantages and disadvantages. The "low goal" will assure that the campaign is successful, and everyone involved will feel great when the goal is surpassed. A drawback is that less money buys fewer services, and the top donors will adjust their gifts downward--when they give less, so do others. In the "high goal", it is assumed that by over-extending, the public might be motivated to give more and thereby advance the cause that much further. A potential difficulty, however, is that the organization may be stigmatized as a failure if the goal is not achieved. The high goal may also frighten off leadership. The "actual goal" looks best--on the surface. It is honest, realistic, and achievable, but, if the goal is not attained, participants will be demoralized. Also, this goal lacks the power to inspire and can reduce the value of a windfall contribution. Finally, there is the "no goal". With no goal, "failure" is impossible, and for new groups, it is the best

approach. The drawback is that neither potential donors nor the organization itself are given any guidelines for commendable achievements.

Obviously, the design of a campaign goal is a complex procedure. Each organization must take into account its unique circumstances as well as its fund-raising potential. To this end, both Warner (1975) and Seymour (1966) suggest a percentage approach. Warner advises that the estimated sum of contributions from the leadership group plus the ten largest outside contributors is approximately equal to a third of what can be achieved. Seymour simply recommends that the top leadership be polled anonymously, and it may be assumed that the sum represents 15% of the organization's fund-raising potential.

Publicity:

Although most of the publicity is geared for the latter part of the campaign, it is necessary to start its planning early. Publicity, however, does not raise any money. At best it creates an atmosphere favorable to the cause, but it should be remembered that people give to people, not to billboards, newspaper ads, nor slick television spots.

Warner (1975) indicates three major considerations about publicity. First, the organization must be able to respond effectively to the increased public awareness generated by the publicity. Next, publicity should be tailored to the unique features of the community--what works in Peoria may not work in New York. Finally, publicity about workers and donors makes them work and contribute that much more; some of the limelight should fall on them.

There are several very basic rules about campaign publicity emphasized by Hutler (1977). Campaign material must get the prospect's attention instantly and hold it throughout the message. In addition, the message must create a desire to act, and, finally, this desire must be directed toward the particular campaign.

Publicity may take the form of spoken words, written words, or audiovisual presentations. Publicity needs to be as personal as possible. Grubb and Zwick (1977) have an excellent step-by-step formula for personalization: add up the "we's" and "you's" in your campaign publicity; if the "we's" outnumber the "you's", start over.

Publicity also serves the function of attracting campaign workers, especially in the pre-campaign stage.

The Campaign Calendar:

Schedules and deadlines are one of the key trademarks of a campaign; it becomes clear, therefore, that a detailed campaign schedule must be established early.*

*Hutler (1977) gives an excellent example of a campaign calendar.

THE CAMPAIGN IN ACTION

At this stage of the project, many things are happening simultaneously: worker recruitment, training, the rating of prospects, and the solicitation of advance gifts. What follows is a roughly chronological ordering of the activities.

Volunteers:

Face-to-face solicitation is the most effective means of fund raising. For a project to be successful, therefore, a sufficient number of volunteers must be recruited to cover all the prospective contributors.

Both Taylor (1976) and Hutler (1977) have excellent reviews for the recruitment, training, and use of volunteers. It is a step-by-step process which functions from the top down. The general chairperson recruits the division heads who, in turn, recruit the team captains and so on down through the organizational chart. The volunteers will become the pool from which future leaders will be chosen. It is important, therefore, that volunteers are informed that they are the key to the campaign's success and that certain specific tasks will be expected of them.

For these reasons, volunteers need to be trained. The task can usually be accomplished in one well-planned, well-run meeting. Training should include two elements: 1. Why and What--an explanation of the cause, the program, and other work of the organization. It should be factual but expressed in terms of human needs. In addition, it is extremely beneficial if volunteers visit programs and see for themselves. 2. Techniques of Solicitation--volunteers should be taught the art of presenting the case, asking for a contribution, and overcoming objections. Instructional aids such as role playing, visual aids, and discussion should be used. Video-tape is an excellent tool and is highly recommended.

Volunteers should leave a training session excited, enthusiastic, and knowledgeable. They are the key to success. It is also useful to keep a file on the volunteers, which should include pertinent information and the individual's performance record.

Rating prospects:

One of the distinguishing characteristics of campaigns is that prospects are solicited for a target contribution. This requires research, evaluation, and assignment.

The campaign's volunteers who have some sort of contact with prospects, whether social or professional, are the campaign's primary researchers and sources of information because they have access to data about prospects. The task is to draw out and then organize this information in a useful fashion. Information may also be gathered through other public sources such as financial directories and announcements of contributions to other organizations. Finally, past contributors to the organization should be included.

In the evaluation stage, all the data is reviewed. This should be done by those who will be doing the soliciting. Based on this information, an

appropriate and realistic solicitation goal can be determined.

At the assignment stage, the purpose is to get the best solicitor for each prospect. In this manner, solicitation is further personalized. Solicitors are most successful when they have some social contact with the prospect and when they are in the same contribution category. The solicitor for a \$1,000 contribution will be most effective if he or she is donating a similar amount. For larger donations, it is often advisable to have more than one solicitor assigned to the prospect.

The Solicitation:

Ultimately, all the planning, recruiting, training, and rating is directed toward bringing the prospect and solicitor together.* The elements which contribute to the success of an individual solicitation may be divided into classes of greater or lesser significance. There is a universal agreement in the literature that face-to-face solicitation yields the best results. The greater the degree of personalization, the greater are the solicitor's chances of success because, as previously noted, "people give to people". Flanagan (1977) reports that an additional benefit of this technique is that people give more when they are also solicitors.

The next relevant factor in the solicitation is that of "perceived crisis". Seymour (1966) reported that people will give more when they are "cued" for sacrifice and that wars and other disasters are such "cues". For example, the Jewish community historically has responded with substantial gifts in times of crisis. This was evidenced by the outpouring of contributions during the 1967 and 1973 Arab-Israeli wars.

Another factor of significance in Jewish fund-raising is that of "Jewishness". Knudsen (1976, p. 28) reported that fund raising tied with religion "seemed to be getting top dollar". Ritterband and Cohen (1979, p. 13) reported what they termed "the more, the more" theory. This stated that Jews who take seriously one aspect of Jewish life tend to respond in like manner to other aspects including philanthropy. They further reported that ritual observance was the best predictor of giving and that observant Jews give a higher percentage of their incomes than less observant Jews.

The final, highly significant factor in solicitations was that of the solicitor himself and, in particular, the solicitor's gift. Flanagan (1974) stated that the solicitor is selling him/herself as much as the program. Hutler (1977) concurred in this and added that the solicitor must be trusted by the prospect. These two elements come together in the solicitor's gift. Seymour (1966) found that the best responses were to workers who had contributed, and Warner (1975) concluded that the solicitor's gift must be a "real sacrifice" for him/her to be effective.

In addition, there are factors of lesser significance to fund-raising campaigns. Past giving was reported as a strong predictor of giving, because "giving begets giving" (Seymour, 1966, p. 28). Those who had previously

*Hutler (1977), Seymour (1966), and Warner (1975) have practical "how-to" reviews of the actual solicitation meeting.

donated through mail solicitation were three to seven times more likely to give as those who had never given (Grubb & Zwick, 1977). There is also the element of social coercion (Ritterband & Cohen, 1979). Contributors tend to belong socially to a community of givers which reinforces and promotes giving.

The specificity of the request is another factor. The dimensions of this element include specificity of the amount requested and the specificity of the project for which it was solicited. Solicitors are more successful when they ask for a specific item (Seymour, 1966; Flanagan, 1977). Flanagan continues that tying this with a specific amount is even more successful. This is a feature of the case. An example of specificity in a solicitation, which continues the earlier example of case-building, might be: "Will you give the central kitchen facility in this apartment complex for the elderly which will cost \$X?"

A final factor in the success of solicitation is that of a tax advantage. Seymour (1966) and Hutler (1977) report that this is seldom a prime motivator for donors but may help determine the amount of a contribution. The role of the tax advantage is generally given more credit than it is due. Discussions about tax advantage may lead to a discussion about giving, but its role in the person's decision to give is minor.

Solicitation Meetings:

There are numerous formats other than one-on-one solicitation, and when soliciting large numbers of people, these methods are necessary. Dinner meetings and parlor meetings are particularly productive.

Dinner meetings take a tremendous amount of work, particularly in planning one with a guaranteed full turnout. A dinner meeting that does not fill the room will be perceived as less than successful. There are numerous elements that need to be carefully planned, e.g., speakers, menus, room arrangements, per plate charge, card calling, etc. Hutler (1977) and Warner (1975) are good sources to consult before planning such an event.

Parlor meetings are peer group meetings of between ten and twenty persons who are invited for the specific purpose of making their commitment during the meeting. Parlor meetings are one of the prime techniques for soliciting and obtaining large gifts. Peer-group pressure is a key element, and, for this reason, only prospects of equal potential for giving are invited. This event has an open, social atmosphere and brings together people who know each other. It also provides a pleasant setting in which influential people can exercise their influence.

New Techniques--Missions to Israel:

In recent years, a new technique of fundraising has been used very successfully by the AJC. This technique is known as a "Mission to Israel". Essentially it is a ten-day visit to Israel in which participants as a group meet with Israeli officials and leaders to learn in detail the specific problems of Israeli society as well as the specific solutions and costs. The Americans are taken to see places that are off-limits to ordinary tourists; they are made to feel special. Also, they get a good sense of the urgency of the need and are shown how they can effect a change. Smolar

(1979) reported that 30-35% of all funds raised by the AJC in recent years was pledged by people on missions.

Pace-Setting Gifts:

A sad reality of fundraising campaigns is that about 80% of the money will come from about 10% of the donors. Advance or pace-setting gifts, therefore, can make or break a campaign. The process of soliciting these gifts is the same as that described earlier. The psychological impetus and peer pressure leverage of pace-setting gifts should not be underestimated. Pace-setter prospects should be made aware of their important role and obligation. Also, there is the powerful psychological benefit of entering the public phase of the campaign with half or more of the goal already achieved.

CLOSING

Reaching the campaign goal is only the beginning of the end of the campaign. There are many loose ends which must be tied--primarily in administration and evaluation.

The campaign office must go into high gear to close out the campaign. Pledges must be redeemed or billing arrangements made. Every contribution must be acknowledged. This is very important. Everyone likes to hear the words, "thank you". Particularly noteworthy contributions should receive individual attention from top leadership.

A final evaluation should take place soon (within a month) after the campaign while impressions of events are still fresh in everyone's mind. Evaluations should take place on all levels of the organization. There should be included a review of the case, techniques, procedures, expenditures, and solicitors. A review of the campaign statistics should be done to spot areas of strength and weakness. When all this is completed, a final campaign report should be prepared for future reference. The report should include goals, results, budgets, copies of all publicity, and the proposed and actual calendars.

The most frequently neglected yet the most important post-campaign activity is giving special recognition to every volunteer. This can be done in a social setting and should be fun. As Seymour (1966, p. 102) suggests, "tasteful differentiation" should be made of those who have done an exceptional job. Plaques and certificates are the expected form for this but a creative approach can make the distinction more personal and meaningful.

Fundraising in the private sector is increasingly important in making possible the delivery of social services and in effecting social change. The profession of social work must recognize this fact. There is a great deal of potential wealth that can be collected and directed toward "doing good". Thus, social service professionals must focus their efforts on developing skills to raise funds more effectively and imaginatively.

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Discussion about Solicity

Friday afternoon
Jan 22

1. ✓ How Do you Feel About Solicity
2. ✓ Why Do It - why is face-to-face a superior method.
3. What Constitutes a Solicitation
4. How Much - Rating - How Decide what to ask for
What are the Standards
Hang in with the Asking Figure - don't "handle"
5. Turn-arounds
6. Role-playing - David
7. Let them solicit each other.

also add 1/2 hr.
"hot items" to sell

- 1) Russian packages
- 2) German tank transports
- 3) Pakistan reactor

will have seen

Dachau
Absorption Center
JDC

Sat. items

Rules of leadership

Recruiting

Continuity

Calendar for 1982

Ten Commandments of Big Gifts

1. Timing of solicitations, as part of a major action, to utilize fees examples.
2. Work against a date (mission, or function, etc.)
3. Make up campaign diagram, showing ratio of big gifts to balance of campaign, and how many needed in each category.
4. Careful rating of each card as part of above
5. No dependence on one or two extraordinary gifts, which can cause distortions and disaster
6. Establish principle of fluctuation - no locking in - up & down
7. Assemble the arguments carefully.
8. Select ~~solicitor~~ solicitor(s) carefully - and go.
9. Design reward or recognition for ~~the~~ solicitee.
10. Plan some form of contact, at least once, before next year's solicitation.

THE CAMPAIGN CHAIRMAN

ATTITUDES

"The effective Chairman has a greater impact on the campaign after he is out of office than while he is fulfilling his nominal position."

If you recognize that the growth and development of the Jewish future rests upon your actions, you will run your divisions with the same fervor, and drive that you run your home or business.

As Chairman you are among the small cadre of Jews around the world that numbers at most a few thousand, who have put themselves on the line, with time, money and commitment, to do the nitty-gritty work to ensure there will be the funds to build Israel and to care for Jews in need.

TRENDSETTER

- Set Example, Credibility, Respectability.
- Giving - doesn't have to be largest but represent giving at the fullest potential.
- Knowledge - Campaign, issues, the organization and Jewish affairs.
- Enthusiasm - Help volunteers to maintain the pace of their work and their commitment to their work.
- Time - Must be committed to spending the time needed to provide for the maximum direction and contact with volunteers.
- Change - Open to introduce and experiment with new programs, approaches to fundraising, missions, training speakers, etc.

RECRUITER

- Leadership Development
- A volunteer organization requires a constant infusion of new workers with a variety of talents. The Chairman must aggressively reach out to new people or bring them up through their organization, delegate responsibilities to them, and work closely with them to guide them through their first leadership experiences in our organization.

ORGANIZER

- Work with professional to evaluate past experiences of the division, to analyze strengths and weaknesses, and to develop structures and allocate resources to address these finding.
- Set realistic, broad and challenging goals with co-workers.
- Establish a structure wherein each worker understands his/her position, whom they are accountable to and one that effectively allocates the available forces of workers to achieve the divisions goals.
- Maintain high visibility and constant contact with leadership and workers so they are up-to-date on issues and so are you on their concerns. Motivation and accountability.
- Establish a strong relationship with your Professional Staff. They are a valuable resource for ideas in all areas of campaign.

MANAGER

- Recognize abilities of others.
- Sensitive to motivation of others and yourself
- Good listener
- Team Builder, surrounds oneself with top quality people, involves them in policy and decision-making, creates esprit de corps.

TROUBLESHOOTER

- Handle major share of assignments especially "toughies" using your prestige as Division Chairman.
- Confront hard decisions related to campaign issues and policies.
- Help to maintain "shalom bais" among workers and with contributors as necessary.

SPOKESMAN

- To be conversant on campaign story, where money goes, and broad Jewish issues.

REPRESENTATIVE

- You represent the standard of Leadership of U.J.A. - Federation. In that capacity you are often invited to represent your Division or U.J.A. - Federation at National and citywide functions, as well as at community and trade meetings.

← GREATER LEADER AUTHORITY

GREATER GROUP FREEDOM →



CAMPAIGN PLANNING GUIDE

This list of questions will serve as a guide for you in making initial plans for your Division's Campaign this year. As "managers" you must consider the appropriate goals, structures and calendars to ensure successful campaigns. In addition your planning should provide for some new campaign ideas and approaches which will help to keep our work dynamic and interesting.

GOAL SETTING

List the data and evaluations you will want to review about previous campaigns as you begin planning and set goals for this year.

How will you gain your workers acceptance of the goal?

What about creating a fundraising goal and campaign plan for involving:

New workers

New givers

Young people

STRUCTURE

Draft a Table of Organization for your Division. Identify what kinds of volunteer assistance you will need and where you can delegate responsibility for projects.

Who will you turn to in order to fill these positions?



EDUCATION

How will you educate your workers about the UJA-Federation story and teach them how to solicit?

CALENDAR

Plan a solicitation schedule for the categories listed below. Indicate who should the solicitors be and "where and how" the solicitations should be conducted.

Category

Solicitor

"Where & How"

Division Leadership

Workers

Major Contributors (5,000 & up)

Significant Contributors (1,000-5,000)

Function Participants

New Givers

Other



Plan a draft of the calendar for your Division's campaign this year including all of the meetings and functions which you feel are necessary and appropriate.

SOLICITATION TECHNIQUES

by Stephan Schiffman

Effective solicitors are not born, they are created through a combination of dedication to a cause, education, hard work and some experience. In order to be a successful solicitor, one must understand the various elements that go into the art of solicitation.

Soliciting is very similar to selling. As in selling, there is an introduction, a period of explanation, a point of decision and, finally, the close. If the solicitor understands each of these elements, he or she will be successful. In short, solicitation requires a sure grasp of these various techniques. The following will give you an outline of the art of solicitation.

As a solicitor, there are four attributes which you must have as you face the New Gifts prospect.

- Honesty -- about what you wish to get from the prospect
- Cause -- to which you are dedicated
- Gift -- you are asking no more than you have already done yourself
- Knowledge -- familiarity with the subject you are talking about

Remember that when you begin a solicitation, the first and foremost thing you have going for you is your sincerity. You are going to approach the prospect on an honest and realistic level. Your integrity and reputation are at stake. Therefore, be honest -- don't lie; don't exaggerate; tell the truth.

Secondly, our cause is like no other. Your cause is different from all others and that difference is something that we must all remember. Your cause, is different from other national charitable institutions.

Your own belief in the cause comes through to the prospect. It is your dedication to this cause and your belief in its supreme importance that will impress the potential giver. These "vibrations" will be picked up by the prospect.

Third, your own gift is extremely important. If you were interested in a job selling life insurance, one of the first questions the interviewer would ask you is, "Do you own life insurance?" If you didn't the interview would end. Soliciting is similar to this. Unless you have proven your own commitment yourself and backed up those words of praise to "the cause" with tangible actions, you will not convince others to give.

The fourth aspect is knowledge. You possess knowledge of the workings of the agency that the other person does not have. Many people like to think of solicitation as a form of discussion. In fact, to some, solicitation is a form of discussion in modern-day society. Use the solicitation not only to obtain a gift, but to exchange information.

Now, let's take a look at the seven steps that go into the actual solicitation.

1. Introduce yourself
2. Establish rapport -- small talk
3. Set tone -- serious
4. Ask for dollar amount
5. Turn around objections into positive statements
6. Confirm the pledge
7. Thank the prospect

Using the list above, let us see how a solicitation works. When you first enter the room, you are going to introduce yourself. This may be as simple as stating your name and explaining your purpose for being there.

The second step will come in establishing rapport with the prospect by engaging in some conversation which may be about the children, the weather, or some other subject which may help both of you relax and "break the ice".

Thirdly, setting the tone becomes extremely important. You are there for serious business. You have to be serious about the subject. It is vital that you believe that solicitation is a mission, not just an exercise in obtaining money. There is a real purpose in soliciting which is summed up by one word -- "communicating".

Fourth, the average solicitation takes approximately 45 minutes. Therefore, if you ask for the dollar amount in the last ten minutes of the solicitation, you only have ten minutes to get that money. However, if you ask for the dollar amount in the first five minutes, you have 40 minutes to discuss it. The conversation really begins when you talk about the dollar amount. For this reason, you should introduce this element early in the conversation.

Fifth, once you ask for the dollar amount, objections or put-offs are sure to follow. These objections may be "real" or a disguised reason may be given for not contributing. It is your role as the solicitor to distinguish between which objections are "valid" and which are not. This may well be the most difficult part of the solicitation.

Sixth, once you have obtained the gift, confirm the amount by repeating it and then have the pledge card signed.

Seventh, thanking the person is, of course, crucial. No matter how the solicitation has turned out, even if you don't receive the gift, it is important to thank the person for his or her time.