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The Jewish Community Federation of Cleveland

1750 EUCLID AVENUE • CLEVELAND, OHIO 44115 • PHONE (216) 861-4360

October 13, 1971

Rabbi Herbert Friedman
The Jewish Agency
P. O. Box 92
Jerusalem, Israel

Dear Herb:

I plan to be in Israel with the UJA study group, arriving on the 18th, leaving the morning of the 26th.

At Eddie Ginsberg's request, I have agreed to see a number of persons with respect to the Jewish Agency's proposal to set up a worldwide training institute for persons engaged in fund raising for Jewish causes. I'd certainly like to get your views on the subject.

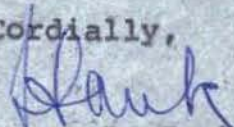
As I understand it, the Jewish Agency has made a determination that a training center should be established. None of the details regarding the training center has been suggested, only the thought that such a center is needed to improve the quality of persons engaged in fund raising for Jewish causes. Are we talking of persons engaged only in fund raising, or are we concerned also about community organizers and community administrators? Are we thinking of a short, refresher course for existing personnel, or are we talking about a longer training program for new personnel which will have to be recruited? What would be the nature of the curriculum? What sort of budget are we considering? What will be the auspice, and where will the center be located?

These and many other questions need to be explored so that a specific proposal can be prepared on time for consideration by the Jewish Agency at its February meeting in London.

When I get to Israel, I'll be in touch with you so that I can get your views on the subject. I don't know anybody who is in a better position to be of help, and I remember from previous conversations with you that you have given a lot of thought to this subject.

I'm looking forward to seeing you. Meantime, warmest greetings.

Cordially,


Henry L. Zucker
Executive Vice President

ag

August 6, 1971

Mr. Edward Ginsberg
650 Terminal Tower
CLEVELAND, Ohio 44113
USA

Dear Eddie:

At the request of Louis Pincus, who left for South Africa yesterday, I write in connection with the Agenda for the forthcoming meeting of the Committee on World Fund-Raising which is scheduled to meet on Sunday, August 29, 1971 at 9.30 a.m., in the Jewish Agency Building in Jerusalem.

The following Agenda is suggested for your consideration:

1. Review and analysis of WJA, Keren Hayesod, UIA and other central campaigns for Israel, beginning with 1967 to date.

Information and background data should include a breakdown of pledges and cash, the number of contributors, the categories of gifts, special problems indigenous to each country and campaign, description of parallel fund-raising efforts on behalf of Israel and other Jewish causes in each country, assessment of the potential of each country on a long-term basis, bearing in mind the details of the above.

2. Goals for 1972 campaign.

Agreement on campaign line emerging from the general situation and the budget of social and human needs which are the responsibility of the Jewish Agency in the coming fiscal year.

3. Implementation of resolutions adopted at Founding Assembly of Jewish Agency on world-wide fund-raising.

The centrality and primacy of the campaign, in addition to publicity and scope, calls for the clearing and proper timing of other fund-raising efforts in behalf of Israel and other Jewish causes.

4. The establishment of an institute on fund-raising in Jerusalem for the training of professionals from Israel and abroad.

2.

I am sending a copy of the suggested Agenda to Mr. Michael Sacher and others involved in the Committee on World Fund-Raising, so that we can coordinate our thinking prior to the meeting and thereby attain maximum results.

I look forward to seeing you again in Jerusalem.

Sincerely,

Zelig S. Chinitz
Resident Representative

PS:

Many thanks for your expression of condolence to me and my family in our hour of sorrow.

ZSC:er

הסוכנות היהודית לארץ ישראל
THE EXECUTIVE OF THE JEWISH AGENCY

Telegrams: "JEVAGENCY" JERUSALEM
Telephone: 39261 (9 Lines)

OFFICE OF THE EXECUTIVE
P. O. Box 92
JERUSALEM

Ref. No.

August 25, 1971

TO: Rabbi Herbert A. Friedman
FROM: Zelig S. Chinitz (Coordinator)
RE: COMMITTEE ON WORLD FUND-RAISING
(Chairman: Edward Ginsberg; Co-Chairman: Michael Sacher)

The meeting of the Committee on World Fund-Raising will be held on Sunday, August 29, 1971, in the Weizmann Hall of the Jewish Agency, Jerusalem.

Items on the Agenda include:

1. Review and analysis of central campaigns for Israel, from 1967 to the present.
2. Goals for 1972 campaign.
3. Implementation of resolutions adopted at Founding Assembly of Jewish Agency on world-wide fund-raising.
4. The establishment of an institute on fund-raising in Jerusalem for the training of professionals from Israel and abroad.

We have scheduled two sessions, the first from 9.30 a.m. to 1.00 p.m.; the second, from 3.30 p.m. to 5.30 p.m.

January 24, 1972

REPORT

To: THE WORLDWIDE FUND RAISING COMMITTEE OF THE JEWISH AGENCY
From: HENRY L. ZUCKER
Re: PROPOSAL FOR AN INTERNATIONAL TRAINING CENTER FOR FUND RAISERS

I. INTRODUCTION AND SUMMARY OF RECOMMENDATIONS

At its August, 1971 meeting, the Board of Governors of the Jewish Agency approved a proposal of its Worldwide Fund Raising Committee that there be established an International Training Center for Fund Raisers. The Committee was directed to spell out details of the proposal and to report to the February, 1972 meeting in London.

At the request of Edward Ginsberg, the Chairman of the Committee, I undertook to draft a proposal for the consideration of the Committee. In the process, I have consulted with about seventy lay and professional leaders. The draft proposal presents what I believe to be a practical program which takes into account a variety of opinions expressed by these community leaders.

The proposal for an International Training Center for Fund Raisers is timely. The readiness of Jewish community leaders throughout the world to work together is evident in many areas of organized Jewish life, and it was emphasized by the leaders who were consulted in the process of considering the present proposal.

It is clear also that lay and professional leaders agree on the need to set up new instruments to help train leaders for fund raising and for Jewish community professional leadership generally. In the United States, the Council of Jewish Federations and Welfare Funds and the Bureau for Careers in Jewish Service have taken the lead in developing programs to prepare people for Jewish federation work and for fund raising specialties. New programs are already in operation or will soon be in operation in universities in five cities. The Bureau for Careers in Jewish Service has recently commissioned a study to recommend curriculum in fund raising for institutions for higher learning. These and other training programs are expected to be a prime source for the training of the next generation of American Jewish federation executives.

A parallel program has been projected by the United Way of America, Inc. which is setting up a university-connected training center for professionals in United Way work.

Thus, the proposal by the Jewish Agency parallels concurrent proposals in different settings.

The lay leaders with whom I consulted believe that the proposed Training Center is a "top priority" for Jewish communal service. They recognize that the fund raising job has grown in size and in scope faster than the quality and numbers of the professional leaders; that there is a great shortage of competent fund raisers; and that many important jobs are now filled by under-qualified persons.

The professional leaders agree that the proposed Training Center is a desirable development because it will help to fill a need to train better fund raisers for Israel. However, a number of American federation executives question whether the proposed Training Center would serve the primary training needs of their staff as well as these needs would be served by other training opportunities which are becoming available in the United States. They are concerned that the new Training Center might become more of an in-service training experience than a truly professional educational experience.

Recognizing that the overwhelming judgment of lay and professional leaders confirms the view that an International Training Center should be developed to train fund raisers for Israel, the following specific recommendations are offered for the consideration of the Worldwide Fund Raising Committee:

1. That the Training Center be developed under the auspices of the Jewish Agency in cooperation with the Keren Hayesod, with the national United Jewish Appeal in the United States, and with other national bodies engaged in raising funds for the Jewish Agency;
2. that, at the beginning, the student body be composed primarily of younger professionals and new recruits for fund raising positions in organizations which are raising money for the Jewish Agency and the Keren Hayesod directly or through their national organization;
3. that the classroom aspect of the work be located initially in Israel, and the field work primarily in the United States;

4. that the curriculum be broadly conceived to include technical training in fund raising, the psychology of giving and human motivation, budgeting, planning, community relations and agency administration, and general instruction relating to organized Jewish life and the "why" of fund raising;
5. that the basic offering be two to three months in duration, including field work, with the objective of renewing the training experience about once in five years;
6. that the basic cost of meeting the students' needs be met by the sponsoring agencies, and the out-of-pocket costs of the Training Center be met by the Jewish Agency, and if practical be shared by the Keren Hayesod, the UJA, and possibly other organizations;
7. that an International Board of Overseers of approximately thirty members be appointed to oversee the work of the Training Center; that this Board of Overseers be responsible to the Worldwide Committee on Fund Raising, but be given as much autonomy as practicable; and that immediate steps be taken by this Board of Overseers to set up a Search Committee to recruit for the Center a top-grade Director-General and Co-Director; and
8. that these recommendations and a variety of additional suggestions which are contained in this Report and in the material gathered for the Report be considered by the Director-General and his Co-Director and the Board of Overseers as they develop specific plans for the Training Center.

II. AUSPICE

There was a variety of opinion as to the auspice for the Training Center. Some leaders assumed that since the proposal came from the Jewish Agency, the auspice would be the Jewish Agency, and others agreed that, in any event, it is logical that the Jewish Agency be the auspice. Several persons suggested that it should be an independent, free standing Training Center "supported by the main Jewish organizations" (Jewish Agency, Keren Hayesod, United Jewish Appeal, Council of Jewish Federations & Welfare Funds, and perhaps others). Some felt that it should be tied to a university or to another type of educational institution.

The degree to which the Training Center should be institution-oriented is the key policy question which should concern this Committee. How closely should the Training Center be wedded to the Jewish Agency - Keren Hayesod? To what extent should it be viewed --at the beginning and as it develops-- as a center to train fund raisers for other Israeli causes and for other Jewish causes?

The answer to these questions will have an impact on the auspice, location, curriculum, student body and faculty of the Training Center. It will affect cooperative relationships with agencies which are a potential source of students, field training, and eventual placement.

The arguments in favor of an institutional-centered approach are:

1. The idea of the Training Center originated with the Jewish Agency because there is a need to strengthen the fund raising staffs of organizations which support the Jewish Agency.
2. The agencies which are likely to supply the greatest number of students, at least at the beginning, are those which work closely with the Jewish Agency, specifically the Keren Hayesod, the national United Jewish Appeal, and the New York United Jewish Appeal.
3. It is more practical to start with a limited objective, and to expand as experience dictates, than to invite delay and possible failure by being too ambitious at the start.

The arguments in favor of training for the broader field of Jewish fund raising are:

1. Total fund raising for Israel and thus all Israel causes - indeed, all Jewish causes - are our concern as Jewish leaders, and our objective should be well trained personnel for all organizations, not just those which support the Jewish Agency.
2. Voluntary fund raising in Israel is making progress, and would progress much faster with better-trained professional fund raisers. There is a demand for better-trained personnel. Improved fund raising in Israel would add to the total funds and would have a positive impact on fund raising outside of Israel.

3. The more broadly the Training Center is conceived, the more likely it is to attract top-grade students and faculty. Conversely, the more parochial in concept and operation, the less likely it is to capture the imagination of bright young people who should be attracted to a career line in Jewish communal service.

On balance, I have concluded that it would be wise to begin with a practical, doable program, built around a nucleus of Jewish Agency-oriented organizations. At the same time, from the beginning we should be laying plans to expand the Training Center to embrace training opportunities for fund raisers of other organizations, and should express our intention to broaden the scope of the Training Center and to invite other Jewish organizations to join in its sponsorship and direction.

There are serious differences of opinion on this subject and the Committee should resolve this question before it authorizes a search for the staff of the Training Center.

III. STUDENT BODY

There was a wide range of opinion as to who should comprise the student body. At one end, it was suggested that the student body should be limited --at least at the beginning-- to the present fund raising staff of the Keren Hayesod and its cooperating organizations, such as the Joint Palestine Appeal in Great Britain, the United Israel Appeal in Canada, the Appel Unifie in France, and the United Jewish Appeal and the federations in the United States.

At the other extreme, some held that the Training Center should be open to anyone engaged in fund raising for any Jewish cause anywhere in the world.

Some persons believe that the highest priority should be the training and retraining of current staff. Others believe that the highest priority is to recruit and train new staff. Some believe that the offering should be for rank and file fund raisers, but not for higher echelon and top executives. Others believe that the training should be offered to all professional personnel from rank and file fund raisers to top executives. Some people believe that there should be an offering for lay leaders as well as for professionals.

To the extent that it can be said that there is a consensus, it can be expressed as follows:

The initial offering should be for the fund raising staff of the Keren-Hayesod, the national United Jewish Appeal, the New York United Jewish Appeal, the federations in the United States, and organizations raising money for the Jewish Agency and the Keren-Hayesod in all countries. It should be aimed at the younger workers in these agencies and at new recruits. From this practical and limited beginning, the Training Center should consider whether it can expand gradually to include professionals in Israel who raise money for Israeli domestic causes; professionals who raise money outside of Israel for Israeli causes; professionals who raise money for Jewish causes other than Israeli causes; and laymen who are actively engaged in fund raising for Israeli causes. It is recognized that experience will help to determine the desirability and practicability of expanding the program. It is clear that multiple offerings would be needed for different groups of trainees.

IV. LOCATION

There was a wide range of opinion as to where the Training Center should be located. Some persons assumed that it would be located in Israel. Others indicated that the United States is a more logical location. There is some sentiment for a location in Europe.

Arguments in favor of Israel are that Israel is the world center of the Jewish Agency and the Keren Hayesod; that Israel is "the product" for which the trainees will be raising money; that Israel is the inspiration; and that Israel is an attraction for professionals who will spend their career in Jewish service. Arguments in favor of the United States are that the "knowhow" in the fund raising field is largely in the United States; that there is a better image of fund raisers in the United States than in Israel; that a United States location would be more likely to attract large numbers of Americans; and that there are excellent field work placement opportunities, building facilities, and qualified lay and professional teaching personnel available in the United States. Arguments in favor of Europe are that a European-centered facility would attract more Europeans; that there are excellent facilities available; and that a neutral and cosmopolitan location is better suited to a generic and international emphasis and would not imply a bias or a parochial focus. Two suggestions about location stand out above the others:

1. That the classroom aspects of the Training Center should be located in Israel, and the field work in the United States and Canada, and possibly in Europe.

2. That there be developed a concept of a "floating" location, with offerings in different locations suitable to the student body which is being attracted. Thus, there could be offerings at different times in Israel, in the United States, in Europe, and possibly in other locations, the faculty moving from community to community as demand warrants.

My own view is that at the beginning, the classroom location should be Israel, the field work largely America, and that the idea of a "floating" location should be considered later.

V. CURRICULUM

This report is not intended to suggest detailed curriculum, which will in any event be the concern of the Training Center faculty. However, it reflects opinions as to what types of subject matter should be considered by the persons who design the program. The trick will be to create a manageable and practical curriculum which will embrace in a limited time as much of the suggested material as possible in a reasonable order of priority; to "tailor" curriculum to the individual needs of the student body; to design plans for continuing education; and, above all, to recruit students who have good academic and Jewish preparation and a suitable personality and capability.

It was assumed by most people that there would be both classroom and field experience.

It was the opinion of the persons interviewed that it would be desirable to have a broad curriculum which goes far beyond teaching techniques of fund raising, both because fund raisers need a broad background, and because many of the trainees would eventually fill positions of broader responsibility in the Jewish community.

Training would be desirable in the techniques of fund raising; in the psychology of giving and of human motivation; in budgeting, planning, community relations, and agency administration and management. The student would need to learn about organized Jewish life; the history and functions of the Jewish Agency and its relationships with world Jewry; the characteristics of and the basic community organization structure in the major Jewish communities and their means of meeting the health, education and welfare needs of the community; and fund raising history, methods and results throughout the world. Curriculum would also need to include inspirational material; the "why" of fund raising, the Jewish religious and ethical commitment, the meaning of Tzedakah, the Jewish condition in the world, the central place of Israel in Jewish life, and related subject matter.

A good deal of fund raising skill is acquired through experience, and field placement is crucial in the training process. Some organizations have demonstrated special skills in fund raising, and these agencies should be sought as field placement centers and for longer term internships.

VI. LENGTH OF TRAINING

Everyone interviewed looks on the Training Center as a continuing center rather than a one-time training opportunity.

Length of the training period for professional fund raisers was conceived from a minimum of a few weeks to a full year. There was some opinion that the basic program for fund raisers should be one month because longer periods would create financial and family problems and problems for the employing agencies.

It was suggested by one person that one month at a time would be desirable, with the idea that the trainees would go back for more than one period of training. There was some sentiment for a nine-months to one-year basic training course for new recruits.

The consensus is that the basic offering should be two to three months, including field experience. Consideration should be given to renewing the training experience approximately once every five years. Ultimately, a program might evolve which would increase to as much as nine months the basic training course for new recruits and younger employees.

Later, other offerings should be considered which would include institutes and seminars of from one to three weeks for higher level personnel and for lay leaders.

VII. COOPERATING AGENCIES

There is the practical question of which employing agencies would look to the Training Center as a place to train their personnel. The answer to this question will depend partly on the quality of the program and on its auspice, location, leadership, and the length of the training period.

It appears now that the following organizations would look to the Training Center as a prime source of training for their fund raising personnel: The Keren Hayesod, the national United Jewish Appeal, the New York United Jewish Appeal, and a number of national organizations which cooperate with the Keren Hayesod, such as the Joint Palestine Appeal in Great Britain.

The domestic fund raising organizations in Israel would very likely make use of the Training Center, if invited, and so perhaps would organizations raising money outside of Israel for other Israeli causes. Although some local American federations would not consider this the prime training opportunity for their fund raising personnel, others probably would, and if the Training Center succeeds in recruiting and training qualified fund raisers, they will be in demand in American federations as elsewhere.

There seems to be little doubt that the practical demand for this training facility from among the organizations mentioned and others which have not yet been canvassed, would be sufficient to develop a viable student body for several years to come. The concept of a "floating location" might add to the potentiality for attracting recruits from around the world.

VIII. BUDGET

No effort was made to develop a proposed budget for the Training Center. Almost everybody interviewed felt that if the concept of the Training Center is well received, financing would not be a serious problem.

It is probable that at the beginning, a nucleus staff of two full-time professionals with appropriate clerical staff would be sufficient to launch the Training Center. It is assumed that the bulk of the teaching staff would be recruited on a part-time basis from universities, from operating agencies, and from among leading laymen. It is proposed that physical facilities be co-opted from existing institutions. No new facility should be needed, at least in the initial period.

It is assumed that the Jewish Agency would finance the basic out-of-pocket budget of the Training Center. Serious thought, however, should be given to the desirability and feasibility of other leading institutions taking financial responsibility in partnership with the Jewish Agency.

A large part of the cost would be financing the student body. It is assumed that the cooperating agencies would carry most of this cost, including continuing salaries for employees who are sent to the Training Center. In view of the fact that many, and perhaps most of the trainees would be family men, consideration will have to be given to a generous expense provision, particularly if the length of the training course is such as to make it desirable for families to accompany the trainee to the Training Center.

IX. RECRUITMENT

One question which needs discussion is whether the Training Center will conceive of itself as a recruitment center as well. If it is able to recruit top-grade new personnel to the field of Jewish fund raising --and this looks like a very promising possibility-- it is likely to be able to expand the student body materially and to place fund raisers around the world.

Fund raising is more an art than a science. Therefore, the personality of the trainee is a first consideration, and skilled recruitment becomes even more important than training.

The recruit should be a committed Jew, with a positive and optimistic outlook on life, and an outgoing and pleasing personality.

He should be emotionally mature, generous in his attitude toward other persons, self confident in relationships with laymen and with other professionals. He should be bright and intellectually curious. He should be in good health, with sufficient stamina to work under pressure. He should be understanding of human motivation, and capable of listening with patience to other persons' opinions. He should enjoy working with people.

Our objective should be to come as close as possible to locating and recruiting persons who answer this personality description. No training course will compensate for personality deficiencies. Admissions to the Training Center will need to be carefully screened, otherwise the Training Center could be largely an exercise in futility.

Should the Training Center take the leadership with its cooperating agencies to set up a formal recruitment program to attract qualified people to the Training Center and to the field of Jewish communal service?

X. ATTITUDE TOWARD THE PROFESSIONAL

Several persons raised the question of whether fund raising could be graded up in the minds of lay and professional leaders as a profession worthy of a lifetime career.

There is evidence that lay leadership all over the world now looks on fund raising as a far more important activity than they previously had visualized; that they are prepared to create working

conditions and pay salaries which would attract and retain qualified personnel; and that in general there is a growing acceptance of the concept of the lay and the professional leader as full partners in the fund raising enterprise.

There is a growing acceptance, too, in Israel that fund raising and work in the Jewish communal service field is an appropriate career for bright young people oriented to professional service. This attitude is gaining ground in other countries as well. It appears that there is now a large number of potential recruits for the field of Jewish communal service, including fund raising, and that these recruits are likely to be of a higher caliber than the persons now engaged in these services.

Present attitudes toward careers in Jewish service offer a historic opportunity to grade up the quality of professional service in Jewish communal service and in fund raising. The Training Center will have a fine opportunity, therefore, to attract and train young professionals and new recruits, and to interpret the need for working conditions which will continue to attract and to hold a "new breed" of professional personnel. It seems clear that a career line in Jewish communal service will be more attractive in the future than in the past, and that the proposed Training Center can be a practical means of achieving this desirable condition.

XI. LEADERSHIP

The assumption is made that the quality of the professional leadership of the Training Center will determine whether it will prosper or fail. The executives who will lead the Training Center will need to be persons of ability, practical experience, established reputation, and inspirational personality.

A number of names have been suggested and turned over to your Chairman. The best qualified of these are already on important jobs. To attract them would require an enthusiastic endorsement of the Training Center idea and aggressive recruitment by top lay leadership.

There is a difference of opinion as to whether the top executive should be an Israeli or an American. Two suggestions have been made which appeal to me:

1. The top executive should be the best person who can be found any place in the world, regardless of his nationality.
2. The executive leadership of the Training Center should be divided among two persons. One would probably be an Israeli, who would be the permanent Director-General. The other would probably be an American, probably recruited from among the leading federation executives, for a six-month leave of absence to serve as Co-Director. This position would turn over from year to year in order to attract the highest quality personnel.

XII. CONCLUSION

In the process of preparing this report, I have received a number of suggestions which are not incorporated in the report, but which merit the consideration of the persons who will administer the Training Center. A useful file of correspondence with lay and professional leaders is available, as are notes of personal interviews and a list of persons consulted in the process of preparing the report.

For my part, I have very much enjoyed this assignment. Indeed, I spent more time on it than I intended, because I became intrigued with the subject. Above all, I became convinced that the Training Center is an idea whose time has come, and I hope now that it can be put into operation in the not too distant future.

My guess is that after the professional leadership is on the job, it would probably take six months or so to prepare for and recruit the first class. Therefore, the earliest date to make the Training Center operational would seem to be the fall or winter of 1972, or perhaps, more realistically, the spring or summer of 1973. The process could be speeded up by the appointment now of a coordinator to work on the project until the permanent Director is appointed.

I thank you for the opportunity to work with you on this project.

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The Jewish Community Federation of Cleveland

1750 EUCLID AVENUE • CLEVELAND, OHIO 44115 • PHONE (216) 861-4360

January 26, 1972

Rabbi Herbert A. Friedman
United Jewish Appeal
P. O. Box 92
Jerusalem, Israel

Dear Herb:

I thought you might like to see the Report to the Fund Raising Committee with respect to the Proposed Training Center for Fund Raisers.

I was glad to have had the chance to talk with you on this subject and would be pleased for any further comments you might want to make with respect to the proposal.

Warmest regards.

Cordially,

Henry L. Zucker
Executive Vice President

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Enclosure