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> Box 65

Folder 4

New Century Fund. "Analysis and proposal." 1993-2001.

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THE NEW CENTURY FUND

Analysis and Proposal

By: Rabbi Herbert A. Friedman

AMERICAN JEWISH

ARCHIVES

June 11, 2001

Meeting with Bruce Soll & Larry Moses

June 11, or

FAILURE of USC 1. Five years wasted 3-merger 2 . ISRAEL NEEDS 3 . a) asked US for 800 m. to cover expenses of Lebenon withdrawal b.) eight months of intifada c.) request is stalled d) future war e) 25% of Isreeli population below poved line 4. AMERICAN JEWISH NEEDS a) no vision, goal a lectership b) nothing exciting happening CONCLUSION Re-create new structure with exciting goals ONLY L.H.W. can do it Weshive U. recently got 275 m. From 10 donors



FAILURE OF THE UJC

I. Jeff Solomon, draft memo on "Transformation of the National System",	March 31, 1998
already indicted inability of parties even to find a logo (name) (p.3) after 13 n	
II. Jeff Solomon, draft memo on "Goals and Objectives," filled with abstractions and generalizations, suggesting that Les Wexner host a meeting, facilitated by David Nadler.	July 29, 1998
III. <u>H.A.F. draft memo to L.H.W. and David Edell</u> outlining a completely new structure and approach.	August 14, 1998
IV. Jeff Solomon memo on "Merger Technical Assistance" none of whose stated objectives was achieved within time frame given.	August 24, 1998
V. <u>H.A.F. letter to L.H.W. urging him not to accept</u> leadership proposed merger.	September 15, 1998
VI. Editorial by Gary Rosenblatt on proposed merger.	November 6, 1998
VII. <u>Richard Wexler letter to Charles Bronfman and Joel Tauber</u> begging for action to achieve a vision including a memorandum (R.W. was asked to write) entitled <u>"Recreating UJC</u> .	September 1, 2000
VII. <u>Richard Wexler letter to H.A.F.</u> outlining four basic failures in the areas of vision, will, voice, spirit resultir in "a malaisespread like a blanket over the lay and professional leadership	
IX. Jewish Week Article Headline – UJC: In Search of an Identity Sub-headline: Seventeen Months into a Mega-merger, Jewish Federations still can't agree on a vision for their central agency.	March 23, 2001
X. <u>UJC Leadership Briefing</u> – issued by Charles Bronfman Totally incredible 4 pages of nothing – no action plan, just verbiage describi decisions to have more meetings – all dates months away.	April 25, 2001 ng

XI. James Tisch Suggested as Next Chairman in November 2001

May 11, 2001

FAX TRANSMITTAL

THE ANDREA AND CHARLES BRONFMAN PHILANTHROPIES 375 PARK AVENUE-6TH FLOOR NEW YORK, NY 10152

To: Rabbi Herbert Friedman Date: 8/28/98

AMERICA

Company:_

3739 751-Fax #:___

From: JEFFREY R. SOLOMON

Pages (Incl. Cover):

Sender's Phone: (212) 572-7374

Fax #: (212)572-7127

COMMENTS:



DRAFT

OBSERVATIONS: THE TRANSFORMATION OF THE NATIONAL SYSTEM---PROMISE, REALITY AND HOPE

In February of 1997, the leadership of the Council of Jewish Federations and United Jewish Appeal "achieved unanimity on recommending the creation of a joint operating Partnership between the two national bodies." This unanimous agreement was reached in four basic areas:

- Joint shared facilities and relevant administrative services
- Integrated total financial resource development
- Integrated community services/regionalization
- A lay structure to provide oversight to the Partnership.

Guiding principles and vision were enunciated:

- 1. To build and perpetuate Jewish peoplehood, individually and collectively.
- 2. To utilize financial and human resources to provide services to improve the lives and increase the strength of individual Jews and Jewish communities wherever they are.
- 3. To build strong local communities.
- 4. To build a closer relationship with a strong Israel.

- 5. To be responsibile and responsive to Jews here and around the world both in terms of rescuing those at risk and caring for those in need as well as enhancing the quality of life for the total Jewish community.
 - To promote the fact that we are better collectively than individually, and that this collectivity is both a locus for people and a modus for unity.
 - To provide a national structure which is effective and efficient in the delivery of valuable services and accountable to local communities.

FRICAN

"UJA and CJF, in the spirit of shared history and tradition and in recognition of a powerful, common responsibility to Jewish communities and to the principles of God, Torah and Israel, wish to create a more effective, efficient and aggressive new national structure that will

- Treasure Jewish values, encourage Jewish spirituality and pluralism
- Offer strategic direction and assistance to communities in order to raise more Jews and more financial resources
- Provide proactive and responsive services which empower and strengthen communities
- Strengthen the State of Israel as both the spiritual center of Jewish life and as our full
 partner in securing the future of the Jewish people and most of all, stimulate and
 nurture a culture of shared meaning, shared responsibility and a deepened sense of a
 single people, wherever they may be, engaged in a great and common mission.



This partnership is the beginning of the development of a comprehensive, integrated, seamless approach to the UJA/CJF/Federation system. Its goals and direction are to

- Raise more funds from all sources
- Build stronger, vibrant local communities
- Advocate for the funds necessary to assume the responsibility for rescuing Jews at risk and assisting in their care and needs
- Create and effective and efficient structure that is cost effective and maximizes resource utilization."

Aside from this general statement, there is no vision of the national organization. What will it do? What is needed? How will it function? What services are required by Federations? Jewish Agency? JDC? Donors? Foundations? How will accountability be determined and maintained?

Thirteen months after this lofty promise, the symbol of the Partnership is best defined by its inability to share a common logo In some versions it is the CJF/UJA Partnership. In others it is the UJA/CJF Partnership. In a paper prepared for the UIA Strategic Planning Committee, a large city executive concludes, "The national 'system' today is, in a real sense, a series of competing interests which are not providing creative and unified leadership to Federations as they struggle to redefine their relationships with Israel." In discussions with fourteen Federation executives, the prevailing attitude is anomie: a loss

perfect example of bailure

decision-

making

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of interest resulting from repeated disappointments and recognition that the national system is hardly relevant to their needs.

A recently published UJA/CJF Partnership plan for fundraising, while filled with the rhetoric of integration, proposes no new approaches. As market share continues to drop, Jewish wealth continues to grow, and disaffection continues to fester, the national leadership is mired in its own conflicting and competing history rather than focused on a common vision for the future. This observer would conclude the following <u>conceptual flaws in the evolution of the Partnership</u>:

- No single chief professional or chief volunteer officer is focused on assuring the highest quality integrated system rather than an amalgam of current resources --- lay, professional and organizational.
- While documents speak to the language of accountability, there is little clarity as to whom the system is accountable and what added value the system will bring to those who should hold it accountable.
- 3. It is extremely difficult and dysfunctional to serve both as the integrated resource development arm and the advocate for overseas causes. Fundraising is a blending of community needs and each donor's philanthropic dream. If the fundraising apparatus is also the advocacy apparatus for one component of the mission, its ability to function maximally is severely compromised.
- 4. Serious engagement of the stakeholders has been largely neglected in determining what it is they wish from a national system so that the Partnership and its subsequent

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organizational frameworks can be built as a customer centered entity bringing meaningful value.

- 5. With the change in Israeli society and the concerns of North American Jews regarding that society, no enunciated vision has proposed a reinvention of the relationship truly based on the principles of Kol Isroel Arevim Zeh Bazeh.
- 6. Despite lengthy discussions the United Israel Appeal continues to be a duplicative entity negating the principles of effectiveness and efficiency. Even if integrated, the process of negotiations does not bode well for future decision making driven by mission and vision.
- The exclusive relationship with the Jewish Agency for Israel, despite continued reform attempts, is viewed as a emblematic of the inability to effectively manage change.

An Approach

The negotiations which resulted in the creation of a partnership were stimulated by several communities, in 1994, articulating the need for greater responsiveness on the national level. A group of communities once again need to step forward. They could approach this moment in the Partnership with an action plan, to help manage the change process in 1998, namely:

- Retain a single chief professional officer for the Partnership whose task is to build a new organization to meet the needs of the 21st century.
- Retain a major consulting firm (McKinsey and Co., Deloitte Touche, Arthur Anderson) to conduct an objective stakeholder analysis identifying the services desired by the major stakeholders of the system including the Federations, the United

Israel Appeal in behalf of the Jewish Agency for Israel, the American Jewish Joint Distribution Committee, key philanthropists, foundations and service agencies. This report would serve as the basis for a streamlined national entity, discarding many services which are underutilized or viewed as inadequate and beginning others that might better serve the mission of the national system.

- 3. Demand that the relationship with the Jewish Agency be moved from exclusive to primary as an important symbolic action to develop philanthropic alternatives and create greater accountability in the relationship with the primary overseas beneficiary/partner.
- 4. Create a transition governance structure which is small, future focused and representative of the previously identified stakeholders. This transition structure should be sunset in a period of less than two years.
- 5. Indicate a willingness to obtain additional resources for the costs of this transition while at the same time, indicating a readiness to use two party checks in order to fund JDC and JAFI while holding UJA fees and CJF dues in escrow in behalf of creating a strengthened, more accountable system.
- Collaborate with other major communities throughout the country to assure their readiness to participate fully in a reenergized, reinvented, accountable national system.

Background memo of Jeff Solomon on UJC Structure – Typical vague generalizations – nothing hard or specific Bring in a consulting company (oh vay!) Future doom could already be predicted The Andrea and Charles Bronfman Philanthropies 375 Park Avenue - 6th floor New York, NY 10152 telephone: 212-572-7374 fax: 212-572-7127

MEMORANDUM

Date: July 29, 1998

To: Marvin Lender Bruce Soll

CC:

From: Jeffrey R. Solomon

Subject: Goals and Objectives: Meeting to be hosted by Leslie Wexner and facilitated by David Nadler

I believe that our conversation provided the basis for the next steps in assuring that the North American Jewish community can maintain its position of philanthropic primacy via a rational, inspired, cohesive system of local, national and international entities aligned to fulfill in today's environment the noble vision of our ancestors: Kol Yisrael Arevim Zeh Bazeh, all Jews are responsible one for another, Tikkun Olam, and we shall heal the world, and to ensure this vision in perpetuity...And you shall teach your children.

An assessment of the move through the Partnership and into the merger suggests that the intense focus on broad philosophical vision, ownership and equity stake, governance issues among diverse stakeholders and ongoing operations has resulted in a number of skipped steps which create the risk of inadequately exploiting this organizational moment for optimal change. Consequently, a carefully developed one day retreat can sensitize its participants to those skipped steps and necessary considerations at this time, namely:

- The change process requires intense management. This management can only succeed through a lay professional partnership with professionals fully committed to, and cognizant of principles of change management. Consequently, the appointment of a chief professional officer is the single most important step at this time and other direction-developing processes should be tied to his/her appointment.
- 2. This moment of change is an opportunity to engage and reengage the largest donors to the system; it should not be lost.

I don't agree. Lay leaders must agree on the changes, and pro con help them, but changes are not "tied" to his appointment

- An organizational design phase should be initiated which must be based on an independent stakeholder analysis of value added service expectations and existing organizational resources.
- The organizational core competencies and arenas of excellence must be identified and reinforced.
- Roles and processes within the organization shall follow from the organizational design.
- 6. An implementation plan should await these interim steps and should be developed by the new management.

Additionally, there are a number of more personal objectives in Les Wexner's hosting and chairing this meeting, namely:

- He (and perhaps, Charles Bronfman) associate with the process, bringing greater credibility at this time.
- 2. He leverages this relationship to bring a more realistic view of the role and responsibility of the professional partner, the moment of opportunity, and the dangers of the current path.
- 3. He helps guide the search committee in understanding those organizational requirements that face a newly merged entity.
- 4. He provides credibility and greater understanding of the complexity of a system that attempts to integrate local, regional, continental and global concerns with a realistic view of authority and responsibility in such a system along with the nature of *consensus fidelium* within such a voluntary structure.

We have also identified some additional objectives, namely:

- 1. To look at the issues with "a fresh set of eyes."
- To move the process along following both governance and vision/mission discussions.
- 3. To create and articulate a language of a shared vision and approach.
- 4. To develop a plan to regenerate interest on the part of stakeholders.
- To create evidence toward the value of merger as an opportunity for a new corporate culture.

6. To provide added value at the performance/activity level of the merging entity.

Deliverables.

I believe the day will be successful if as a result of the deliberations:

- 1. A consulting firm is engaged to conduct a value added needs assessment and organization review on the part of stakeholders.
- 2. A beginning sense of seamless unified leadership is identified and acknowledged.
- 3. The historic opportunity of the merger is identified and acknowledged.

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- 4. The participants recognize that they need outside help to manage this process.
- 5. The importance of the chief professional officer to become a guiding force is better appreciated.

I look forward to receiving your responses.

Warmest wishes.





THE ANDREA AND CHARLES BRONFMAN PHILANTHROPIES



Jeffrey R. Solomon, Ph.D. President

MEMORANDUM

Date:	8/24/98
To:	Conrad Giles, Alan S. Jaffe, Marvin Lender, Richard Wexler
CC:	Bennett-Aaron, Charles R. Bronfman, Martin Kraar, Bernard Moscovitz, Jacob Solomon, Jay Yoskowitz
From:	Jeffrey R. Solomon
Re:	MERGER TECHNICAL ASSISTANCE

Pursuant to the discussions that several of us have had over the past week and a half, attached please find my understanding of the task I have been asked to fulfill. While I will proceed with reading the appropriate files, I await your review of this material and a formal understanding that this represents the deliverables you seek.

I also wish to reiterate that I see my role as strategic and facilitative from the outside. The ongoing intense professional work needs to be performed by the staff of the Partnership. I do believe that I might well serve a useful purpose in helping to create a more seamless management team that is future-directed and more focused on the necessary tasks to fulfill our shared desire of a successful merger.

I am also enclosing some additional earlier thoughts following a conversation with Marvin, Bruce Soll and me regarding perspectives on the importance of the proposed meeting on September 18th. I believe these need to be part of the record and our common understanding of the tasks required at this time.

I look forward to hearing from you.



MERGER TECHNICAL ASSISTANCE PROJECT

OBJECTIVES:

- To prepare the substantive material and obtain the necessary approvals to complete a plan of merger between the Council of Jewish Federations, United Jewish Appeal and United Israel Appeal.
- To facilitate the engagement of an outside management consulting firm to provide substantive assistance in the merger including, but not limited to a stakeholder analysis of needs, expectations and value added products.
- To align lay and professional leadership around a common vision, organizational mission, ongoing activities and first annual plan.
- To provide the new Chief Executive Officer with policy options materials so that he/she can refine and proceed upon an organizational blueprint.
- 5. To create a unified senior management team which can quickly support the new chief executive in the context of a new organizational culture.
- To develop communication mechanisms which assure stakeholder knowledge of and input to the merger.
- To complete the necessary legal, administrative, fiscal procedures to execute the combination.
- 8. To help develop a unified, small working lay team which can emerge in the new organizational culture and climate.

Resources Required:

Activities toward these objectives will be conducted under the supervision of Dr. Jeffrey R. Solomon, President of the Andrea and Charles Bronfman Philanthropies who will be provided on a part-time pro bono basis with a clear mandate, providing him the authority to operate. In consultation with the current chief professional officers, they will assemble a senior management team of the Partnership, among whom the activities in support of these objectives will be distributed.

A single professional (less senior) will be assigned to staff this management team and other organizational entities which support this project.



Time Frame:

This project will operate from September 1 through December 31, 1998.



7000





GARY ROSENBLATT 11/6/98 **Midwife To The Merger**

rouble Is Opportunity" reads the 6 brass-engraved motto on Jeffrey Solomon's desk in Midtown, where he serves as president of the Andrea and Charles Bronfman Philanthropies. As the self-described chief "midwife of the merger" taking place among the United Jewish Appeal, Council of Jew-

ish Federations and United Israel Appeal, Solomon knows full well that there is an abundance of both problems and promise in the fast-changing organized Jewish world today. He's spending much of his time these days trying to convince national leaders that they must re-orient their thinking dramatically to achieve a meaningful new system for the 21st century.

And they're listening carefully as Solomon, the highly respected former No. 2 professional at UJA-Federation of New York, helps them grapple with reconstructing the community's central fund-raising system, which accounts for hundreds of millions of charitable dollars each year, but has leveled off in recent years.

A few days before Rosh HaShanah, Solomon, who has played an increasingly visible role in trying to move the merger forward, helped convene a full-day consultation involving about a dozen national lay leaders. He and others were concerned that the process seemed more bent on trying to compress the three organizations rather than create one new entity. The purpose of the meeting, hosted by mega-philanthropist Leslie Wexner in Columbus, Ohio, was to shake the leaders out of their

Gary Rosenblatt can be reached via e-mail at gary@j reek.org

complacency, make them sense the urgency of the situation at hand as well as the potential for success, and encourage them to hire an outside consulting firm, experts in organizational change, to find out just what local communities want from their national system.

The leaders were told that loyalty around the country to the national system, and belief

in its effectiveness, was waning. Moreover, the system was becoming increasingly obsolete as fundraising and sociological trends indicate that Israel, once the primary focus of American Jewish philanthropy, is economically strong; major donors are dying off and the younger generation is less committed and less independently wealthy;

and the movement among donors throughout the country is toward targeted, rather than centralized, giving.

"We're experiencing a crisis of success, not negativity," Solomon told me. He noted that the core objectives of the UJA system have been met, such as building a more secure Jewish State, protecting and serving Jews at risk, and rescuing Jews from hostile countries.

"We're at a crossroads, similar in many ways to the one the March of Dimes faced four decades ago when the Salk vaccine was introduced," he said.

In other words, when your primary objectives have been met, you can either close up shop or re-direct your efforts. Which will it be?

Some of us would argue that as long as there are still a million immigrants from the former Soviet Union to help settle into Israeli life, the primary mission is far from over. But clearly the needs of the Jewish community are char

ing, and while the process should be evolutionary rather than revolutionary, the focus for the future has to be on strengthening the Jewish people and the connections between them. That means dealing with social service needs in Israel and the former Soviet Union, threats to demographic and spiritual survival in the U.S., and identity crises everywhere.

In the past, CJF, UJA and UIA

sometimes had competing objectives, played out mostly in debates over domestic vs. overseas needs. To succeed, the new entity, now called UJA Federations of North America, must be of one vision and voice.

So far, much of the discussion has focused on the structure and leadership of the evolving organization, rather than its higher purpose, beyond an obvious economy of scale. Physically, the staffs have moved into shared headquarters in the business world as a the old Port Authority building in model for merger. Chelsea, but many of the most tal-

ented professionals, fearful of inevitable downsizing, have left for other jobs, and there is confusion among those who remain.

Jeffrey Solomon: Use

This is a risky, intermediary stage. Humpty Dumpty has fallen but hasn't been put back together yet. The questions for the near future are how do we, as Jews, relate to the world, to each other and to ourselves. That calls for reorienting our thinking about the purpose of a national system. Its goal should not be just to raise money - as many have perceived of it for decades - but to use those funds to support Israel, human services, and Jewish identity in ways that meet current demands.

Since the local federations have lost con-

fidence in and feel disenfranchised from the national system, which they believe has become increasingly irrelevant to their needs, they need to assert their clout as owners of the new entity. In effect, they've won the battle. Now, how can the new organization help them do their work more effectively?

As for leadership positions, there is a strong

effort to convince several of the nation's major philanthropists like Wexner, Charles Bronfman and Michael Steinhardt, who have highly active private foundations, to play prominent and highly visible roles in the new UJA Federation. One rumor has it that Charles Bronfman will chair the new entity and Solomon will be the top pro, at least for the first few years. But Solomon says that while he'd like to see Bronfman take a leadership role, he himself will not be the chief executive He adds that,

contrary to conventional wisdom, the candidates for that position may well come from outside the federation world. Word has it that several university presidents, leaders of industry and execs of national Jewish organizations are being considered.

Whoever heads the new entity will have the difficult task of not only running a major operation but helping to create and articulate the kind of positive, coherent vision about the Jewish future that has been missing in organizational life until now. Given the climate of confusion and crisis, the risks are great. But then, as Solomon would be the first to point out, so are the opportunitie



I WEEK NOVEMBER 16, 1998 7

CONFIDENTIAL DRAFT NOT FOR DISTRIBUTION OF SUHARING

FROM:HAFTO:Les Wexner & David EdellSUBJECT:Goals and Governance: Basic IdeasDATE:14 August, 1998

- National Organization Switches
 When polio doesn't exist anymore, March of Dimes switches to Multiple Sclerosis.
- 2. UJA/CJF Take Note of Above

As awareness of, and attention to the Holocaust diminishes, and as the miracle of Israel reborn is taken for granted, old-fashioned campaigning in these themes is left without glamour or excitement. So...UJA/CJF must shift gears.

 Switch to Strengthening U.S. Jewish Community (in which Israel can play a big role as Israel Government now understands) Create several nation-wide operating foundations (to receive funds which are then allocated back to the local communities for implementation) Such as:

a.) Day Schools, from elementary to high, with token tuition

b.) Learning Hebrew (for synagogue and holiday observance), plus spoken

c.) Hillel - Major infusion of staff (rabbis and others) for creative programming

d.) Israel Experience, for ages 15-25, at token cost to the students, and Birthright, at no cost.

e.) Camping in both U.S. and Israel - hundreds of camps, at very low cost to campers.

f.) Improving ethical standards and concentration on social justice to shape a better society in the U.S.

4. Restructure the Responsibility

Assign high-powered lay chairperson, plus top executive, and staff assistance to each foundation, with its own operating budget. (See attached list of suggestions # 12.

- <u>UJA/CJF Create Operating Foundations</u> for each specific project. All projects in Israel to be managed directly by UJA/CJF. No need for an "agent" to do the work. Copy JDC style which is perfect. They do their work with direct employees or contractors.
- <u>Do Nor Renew</u> usual contract with Jewish Agency and JDC. Instead, phase J.A. (And UIA) out, over four years by reducing their allocation at the rate of 50 million per year. Obtain approval of Finance Minister and Agency Chairman in advance. Make normal annual allocation to JDC (approx. 60 m).
- <u>Convene a National Congress to make quick decision on this new plan.</u> Glacial process of the past to be replaced by deadlines.

8. <u>Rabin's approval</u>

On October 21, 1995, two weeks before his assassination, I met with him and his closest aide, Eitan Haber, in the Regency Hotel, N.Y., to discuss an idea. The UJA was delivering about 200m to the J.A. I suggested holding back 50m and using it for Israel Experience. He asked for assurances that the money would not be diverted, and I answered to his satisfaction. He shrugged and agreed. I warned him that if we learned how to spend it properly and send thousands of kids, I would ask to withhold 100m next year, He understood and said that the government could absorb the loss from the UJA, and the UJA could do Israel a greater good by creating links between Israel and the younger American-Jewish generation.

 Publicize the New "Switch" widely in both U.S. and Israel. "Rescue Our Own Kids for Judaism and Israel."

10. Money

The annual campaign could generate renewed enthusiasm and understanding, with stronger marketing. A huge influx of cash could be available by using the endowment funds of all communities (5+ billion and increasing rapidly every year) as collateral for borrowing. Banks have plenty of money. UJA credit rating is high. The annual campaign could handle interest plus debt reduction payments, on a revolving basis.

11. Structure of UJA/CJF



12. Examples of Lay Leaders and Exec. in Charge of National Projects

Project	Leader	Executive
Fund-Raising	Carole Solomon	Bernie Moscovitz and/or?
Day Schools (elem) and Birthright	Michael Steinhardt	Yitz Greenberg
Day Schools (high)	Charles Schusterman	Joseph Reimer & Ted Sizer
Summer Camps (U.S.)	Rob & Elisa Bildner	Ramie Arian
Hillel	Edgar Bronfman	Richard Joel
Israel Experience age 12 - Summer Camps age 15 - Field Trips age 22 - Graduate Study	Charles Bronfman	Jeff Solomon
Adult Education	Mort Mandel	Nathan Laufer
Hebrew Ulpanim	?	?

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FUTURE PROJECTS

- Any emergency situation in Israel, or anywhere in the world quick mobilization of all lay leaders and executives
- Build infrastructure and lay leadership for Russia and FSU communities make links with JDC, Lubavitch, World Union for Progressive Judaism, and Russian Jewish Congress.





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TO: Leslie Wexner

FAX #: 439-4203

FAX TRANSMITTAL

DATE: 9.15.98



Number of Pages (including cover sheet): _2 erbert FRIEDMAN FROM:

551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

Message:_ siva Soll



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551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

DATE: September 15, 1998 TO: Leslie Wexner VIA FAX: 439-4203

Dear Les,

I sent you a copy of rough notes I wrote describing a completely new model of how the UJA-Federation system should work. I am convinced that radical change is necessary. Otherwise the system will continue to falter and within a decade simply disintegrate.

I don't know if the group coming to meet with you this Friday (Sept. 18) will request you to take the leadership of the present structure. If they do, please, please do not say yes, or don't even say you'll think about it. They may interpret that as an affirmative reply. Ask them, instead, to send you their new plan of action, if they have one.

David Edell, as you know, has been entrusted with the search for an executive director. I have urged him to look "outside of the box". There is no likelihood of expecting that any incumbent professional will conceive of a new way of doing business. I suspect most of them prefer the old way which protects their turf.

I would love to have an hour with you to spell out the details of the model I have in mind.

Love to you, Abigail, and the kids. Herb

LORD, BISSELL & BROOK

115 SOUTH LA SALLE STREET CHICAGO, ILLINOIS 60603

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September 1, 2000

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VIA TELEFAX

Mr. Charles R. Bronfman Chairman of the Board United Jewish Communities c/o The Andrea and Charles Bronfman Philanthropies 375 Park Avenue, 6th Floor New York, NY 10152 Mr. Joel Tauber Tauber Enterprises 27777 Franklin Road Suite 1850 Southfield, MI 48034-2337

Re: United Jewish Communities



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Dear Charles and Joel:

On Wednesday, you had a very important conference call with the lay leaders of United Jewish Communities' Pillars. It represents the first and an important step towards the recreation of UJC as you always intended it to be. Of course that conference call will only be critical if it is followed directly and immediately with the actions demanded by the leadership that you appointed.

The field has been rife with rumor that, somehow, I have acted in the capacity of either Svengali or Machiavelli to the Pillar Chairs, I'm not sure which. Nothing could be further from reality. I and others in federation and UJC lay and professional leadership have participated in a series of on-going discussions. I have listened and I was asked if I could put on paper the thoughts that were being exchanged by those leaders and attempt to interpret those thoughts in a meaningful written way and I have done so. A copy of that Paper is enclosed. There is unanimity among those who have read it that in that Paper I have accurately set forth both the environmental scan of the current circumstance and the vision that these leaders, with you, wish to achieve. Personally, I would go much further than the steps suggested in the Paper which I transmit to you now but there is no unanimity on the further steps that need to be taken to achieve the shared vision of those who, with you, lead UJC.

LORD, BISSELL & BROOK

Mr. Charles R. Bronfman Mr. Joel Tauber September 6, 2000 Page 2

There is unanimity, however, in the conclusion that steps -- bold steps -- need to be taken immediately; that this is not a time for further meetings or Retreats with facilitator or consultants' studies that seem to be the stock in trade of some at UJC; this is neither a time for small steps nor is it a time for petty introspection - accusations of "back-biting" within the senior management at UJC are totally inappropriate and merely, as you have come to learn, an excuse for not moving forward. Last week some in the professional leadership of the Large Cities demanded and received a conference call with Steve at which time, they independently made the same observations and insisted upon the same immediate steps as did your top lay leadership last night. I know that Steve Solender reported on that call to you. And, while Joel apparently only focused on getting Lee Twersky to withdraw his resignation when he met with him in mid-June, Lee attempted to place before Joel the realities of the professional circumstances that confront UJC's top professionals at that time. Unfortunately, it does not appear that that was the message that Joel took back from his meetings with one of the most dedicated professionals in our system.

I think there was a strong sense growing out of your call with Pillar leaders, as I have come to understand it, that you, Charles, "get it". Now, I urge you and Joel to read the enclosed and, please "do it". My friend, Jeff Solomon, has characterized the UJC as a "marathon". He has convinced me – but we are not going to win the marathon if we continue to allow it to run in the wrong direction. All of us are committed to support the positive actions which we know you will take to right this ship and to make of UJC that which you have envisioned for it.

I look forward to being with you in Atlanta.

Sincerely

Richard L. Wexler

RLW:aa Enclosure



RECREATING UNITED JEWISH COMMUNITIES

One and one-half years ago, with great excitement and anticipation, the United Jewish Appeal, the Council of Jewish Federations, United Israel Appeal and, most critically, the Jewish federations of North America joined together to create United Jewish Communities. Since that time, we, among UJC's leaders and leaders of our own Federations, have seen expectation give way to dismay to the point where we believe that United Jewish Communities must be recreated immediately so as to now meet the expectations of its creators. While we applaud the initial steps of ONAD's implementation, the populating of the four Pillars with exemplary lay leaders, and the emphasis on diversity in filling lay and professional leadership positions, we have watched with great disappointment the micro-management of UJC's professional staff to the point of a total breakdown in professional morale, the inability to attract new professional leaders to two of the four Pillars, a serious deterioration in the lay-professional partnership and an unwillingness by United Jewish Communities to engage on the great issues of 21st Century Jewish life here at home, overseas and in Israel. Worst of all, in our travels, consultations and deliberations, we have seen a growing disengagement from United Jewish Communities by its most critical owners, the Federations themselves. We fear that UJC will soon collapse under the weight of unfulfilled promises if bold action is not taken by its owners immediately. We are prepared to help.

With the Chairman of the Board, we share a vision of United Jewish Communities as the central address of the organized Jewish communities in North America. We have a choice: whether to allow United Jewish Communities to continue as it is, with no chance of meeting its owners' expectations or desires or to do something about it -now – by asserting our rights as

owners and by accepting our responsibilities and acting upon them. Because of our common commitment to United Jewish Communities as the vehicle for creating an environment of "change" nationally and in our communities, we unanimously believe that change itself is necessary within UJC so that we may "begin again" and move forward.

In recreating United Jewish Communities, the following initial steps must be taken:

- Lay leadership shall assert its proper role in the lay/professional partnership by:
 - The reorganization of the UJC Management Committee to include only the Chairman of the Board, the Chairman of the Executive Committee, the Treasurer, the Pillar Chairs and the Chief Professional Officer;
 - Directing the Executive Committee to immediately proceed to meet on a monthly basis with an Agenda to be set by the following **only**: the Chairman of the Executive, the Chairman of the Board, the Pillar Chairs and the Chief Executive Officer. (In the absence of the Chairman of the Executive at any monthly meeting, the Treasurer shall chair the Executive Committee meetings.)
 - Requiring monthly conference call meetings among the Chairman of the Board, the Chairman of the Executive, the Treasurer and the Pillar Chairs alone.
- Recognition shall be given to the "semi-autonomous" status of the Pillars as intended by the Governance Documents:
 - There shall be an immediate codification of semi-autonomy through Executive Committee and Board of Trustees resolutions;

- Inter-Pillar coordination shall be achieved through bi-weekly meetings of Pillar Chairs, Pillar Professionals and the Chief Executive Officer.
- Steps need to be taken to enable the immediate engagement of the "best and brightest" as Pillar Chief Professional Officers, and to enhance both the stature and morale of the UJC staff.
- Appropriate changes in the UJC professional structure must be initiated to accomplish these goals.

We recognize that these recommendations are strong medicine, they are also necessary. We see the above-referenced steps only as the first steps in a process toward getting this train back on the tracks. These steps acknowledge that the present lay/professional configuration and implementation have failed to allow professional goals to be achieved; have stilled UJC's voice; and have stifled lay leadership's appropriate roles as policy is not being set by the owners or implemented by them to date; and to achieve the "bottom-up" rather than "top-down". Serious issues of potential controversy have been avoided, set aside or finessed. Our great fear is that as UJC has moved forward to date, all we have done is recreate the Council of Jewish federations with all of its flaws and we have failed to implement the Merger Agreement and the spirit and intent that are at UJC's core. We believe that the chances for United Jewish Communities' success in its present structure are nil but that UJC can achieve the transformational changes that it was created to make, its greatness and its centrality if these recommended steps and others are immediately implemented. We are committed to working with the Chairman of the Board to make UJC as great as is his vision for it.



LORD, BISSELL & BROOK

FACSIMILE TRANSMISSION COVER SHEET

Date: Tuesday, September 19, 2000

TO:	Friedman, Herb		
OR	GANIZATION:		
FAX	X NUMBER: 212/751-3739	N JEWISH	
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FROM:	Richard L. Wexler	1.7.7.7	
AT:	Lord, Bissell & Brook 115 S. LaSalle St. Chicago, IL 60603	Phone: Fax:	
SUBJECT:	1-ster	5	
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September 18, 2000

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RICHARD L. WEXLER BID 443-1751 RWEXLER@LORDBISSELL.COM

> VIA TELEFAX Rabbi Herbert Friedman Director Emeritus The Wexner Heritage Foundation 551 Madison Avenue New York, NY 10022

> > Re: United Jewish Communities

Dear Herb:

I was so pleased to have had a few minutes to visit with you on my trip to New York Friday, September 8th. Your incredible vigor, advocacy and creativity inspire me, and I am so grateful for any time I get to spend with you.

As we closed that meeting together, I promised to get you a brief summary of the greatest failures of United Jewish Communities to date. I have already given you a copy of my paper *Recreating UJC* which would not have been necessary but for the shortcomings itemized below. If only the lay and professional leadership with United Jewish Communities had your passion and vision, we wouldn't be where we are today.

A failure of Vision. I'm going to concentrate here on the lack of lay leadership vision because I know you will recognize as a "given" that the Chief Professional Officer of UJC has none – he is, plain and simple, a juggler hoping that none of the balls that he constantly keeps in the air will hit the ground. While United Jewish Communities was conceived as a visionary organization by the three predecessor organizations joined together to create it, it turns out that the Chairman of the Board and Chairman of the Executive have been unable to express let alone transmit the passion and vision necessary to drive the institution forward to achieve its own vision. Charles is an incredible entrepreneurial philanthropist willing to "put his money where his mouth is" and is totally, totally dedicated to achieving his own long time goals. Where those personal goals have conflicted with the institutional goals or priorities of United Jewish Communities – Young Leadership, Birthright – Charles has pushed his personal dreams ahead of and onto the Institution . Tauber is extremely goal - oriented and expresses whatever "vision" he



RD, BISSELL & BROOK

has only in terms of "projects" – projects that he can promote, if not take credit for. Again, no one is focusing the professional staff on achieving the vision and dreams of the creators of United Jewish Communities. I know no one is willing to take on the responsibilities for or even helping to frame the institutional vision, so there is none.

A failure of Will. The lack of vision has directly contributed to the lack of pursuit of any visionary goals. The reality that two of the most critical professional leaders the Pillars of United Jewish Communities – the Israel/Overseas Pillar and of the Renaissance & Renewal (which has been filled temporarily by Jonathan Woocher on a part time basis); that there has not been a single meeting in over one year of all of the senior professional leadership with Solender; further, Solender delegated the responsibility of "coordinating the Pillars" to Louise Stoll, (about whom enough has been said). All contribute to the breakdown of morale and will at UJC. The result has been a recreation of the very "fiefdoms" that UJC was created to end. And, there is no central focus even in those areas: for example, Campaign/FRSD and Health & Human Services were already focused but there is no will on the part of the lay or professional leadership at the top of the organization to push even their purposes forward. The result of course - demoralization of lay and professional leadership.

A failure of "Voice." United Jewish Communities was to be the central address for the North American Communal system. As such, many of us expected UJC speak out on the great issues confronting North American Jewry in the 21st Century. With an inexperienced Chairman of the Board, an ignorance of the issues on the part of the Chairman of the Executive and a Chief Professional Officer dedicated to risk aversion/avoidance has left UJC with no voice; and thereby, has left the federation system with no central voice. Other organizations have readily stepped in to this void – most notably the Conference of Presidents, far outside the areas of its mandate. Even today, when the constant drum beat of lay leaders of UJC has demanded that UJC exercise its "voice", the incredible process that must be followed before the voice can utter its words means that on matters of urgency, there is silence. The result has been the marginalization of United Jewish Communities beyond even its detractor's expectations.

A failure of Spirit. Notwithstanding CRB's great enthusiasm and passion for young leadership and Birthright, there is no sense of spirit or passion driving UJC in the fulfilment of its goals, its vision, it mission and its obligations. There is no sense, no reality, that United Jewish Communities' lay or professional leadership care about **anything** beyond getting through the week, the month, the months. Those leaders who do care are, thereby, cast in the role of carping critics, yours truly included, and the institution turns this way, then that way, but never, never forward with any sense of value, passion or spirit. There is a malaise that has been spread like a blanket over the lay and professional leadership of UJC that will soon snuff it out. RD, BISSELL & BROOK

Herb, I would be pleased to discuss these matters with you at greater length at any opportunity, if only because such discussions would give me further opportunity to be together with you. May you and your family enjoy a *Shana Tova Umetukah*.

ARCHI

Warmest regards,

#159122v2

AMERICAN Richard L. Wexler

NEW YORK

3/23/01

UJC: In Search Of An Identity

Seventeen months into a mega-merger, Jewish federations still can't agree on a vision for their central agency.

STEWART AIN

STAFF WRITER

s the United Jewish Communities (UJC) struggles to find its footing 17 months after its creation by the Jewish federations in North America, some federation executives around the country are expressing concern, wondering aloud if it is moving quickly enough and even if it is going in the right direction.

At stake are millions of dollars in overseas funding, an agenda with an encompassing vision for the 189 federations in North America, and communal policies such as the Jewish community's response to hot-button issues like the Bush adminstration's proposal for faith-based social service programs.

The UJC plans to focus its initiatives on three pillars: Israel and Overseas, Human Services and Social Policy, and Renaissance and Renewal. But the initiatives have yet to be formulated and are not expected to be until the end of the year.

As the UJC wrestles with the issue of its future direction and projects, one federation leader said bluntly that the organization has little to show for itself because "we can't get our act together. There is a broad consensus that we need a national organization, that everybody shouldn't make Shabbos for himself. But how limited or broad in scope should that be?"

Others have expressed concern that in recent weeks one of the UJC's top two professional leaders, Louise Stoll, resigned under pressure and that two of the group's six vice presidents, Lee Twersky and Joel Daner, have also left or will soon depart. And the director of missions, Nechemia Dagan, has also been replaced.

Questions have been raised also about the organization's dues structure, a holdover from what existed before the Council of Jewish Federations, the United Jewish Appeal and the United Israel Appeal, merged to form the UJC.

"The thing that worries me the most is whether we are putting

a lot of our strategic thinking into questions that may no longer be completely relevant," said Barry Shrage, president of the Combined Jewish Philanthropies of Greater Boston, and frequent critic of the UJC. "Is it really essential for the new organization to be the distributor and determiner of overseas funds and to create this illusive [idea of] collective responsibility? Or is its first job to create a new vision around which a voluntary collective responsibility will form because people believe in the vision?"

ility will form because peobelieve in the vision?" Shrage said he believed that local communities should de-

cide the split between local and overseas allocations but that it was up to the UJC to articulate a "clear vision that would make local communities feel that the [overseas] needs are so clear as to commit to them." As it is now, he said, hours are being spent "fighting over how mandatory responsibility can be enforced."

The inability to reach a consensus led one federation official to quip, "Steve has one of the hardest jobs in the Jewish world today in trying to pull together all of the disparate demands." He was referring to Stephen Solender, president of the UJC.

Solender said the organization has had some accomplishments and was well on the way to achieving others. He said the UJC has been "leading the way in responding to the difficulties in Israel," having sent more than 3,000 Jewish leaders to Israel since Yom Kippur and organized 100 solidarity rallies in communities across North America. In addition, he said



that in May the UJC expects to launch Fed Web, an Internet network that will allow each federation to create its own Web page and receive support material for the site from the UJC.

"This is very exciting and what gets lost is that there are very tangible results of the merger that are surfacing at regular intervals," said Solender.

Solender said also that the staff changes are just part of the "normal startup problems that takes place in any large merger.

... We're also streamlining, cutting back on the number of administrators so we can run a more cost-efficient operation."

Robert Aronson, executive director of the federation in Detroit, said one of the main accomplishments of the UJC to date is that it has given local federations greater involvement in deciding their overseas allocations.

Like Shrage, Aronson identified the issue of collective responsibility as one the UJC still must still wrestle with.

"Will the system be able to work collectively on all kinds of issues, including overseas needs?" he asked. "Will this be a completely voluntary system or not, and if not how is it going to function?

"We also need an agreement on collective responsibility for the cost of the organization and the fair share each community should take for operating costs. That is a large issue because the way the UJC collects its dues is based on an inequitable system that was inherited. Detroit pays an inordinate share of the organization's dues because the share is based on how much each community allocated to UJA for overseas needs. So communities that allocated more paid a greater share, and our overseas allocation is almost 50 percent of the campaign."

Solender said that by the time of the next General Assembly in November, he hoped to have in hand a fair share proposal, a strategic mission and a set of strategic initiatives and program ideas that have been agreed upon.

"It will take a couple of years [to implement the ideas] but





NEW YORK

we're on the right track," he said. "Everybody wants us to become fully mature overnight. That's wonderful because they have wonderful expectations and are excited, but in the real world it takes time to get there."

Joel Fishel, president of the Jewish Federation of Greater Los Angeles, agreed, saying that "17 months is not long in Jewish life and taking time and making serious and thoughtful recommendations is worth the effort."

Jan Perelman, executive director of the Jewish Federation of Oklahoma, said she is hearing among her counterparts that there is a "need for more help locally. We are all looking for consultants. They [UJC] know that they need to be more service oriented in the regions."

Ida Kramer, executive director of the Jewish Quad of the Quad Cities along the Iowa-Illinois border, said she has not seen a difference between the UJC and the three organizations that existed before.

"It hasn't affected us," she said. "I don't mean to put them down, but we are living in our own little world and doing our own little shtick. We know where to go if we need help. I do use some of the literature they send."

Mark Silverberg, executive director of the Scranton-Lackawanna Jewish Federation in Pennsylvania, said his organization is still receiving the same services it had before the merger.

"We were happy then, we're happy now," he said. "The question has to do with economies of scale — have they been able to economize? It has become a national issue as to whether they are saving money. If it has, then it has been successful."

Told that Solender said the merger has saved \$7 million, Silverberg asked why the dues federations pay to the UJC don't reflect that.

"I can't say our dues have gone down, they haven't," he said. "I would like them to go down but I don't have a handle on what their real expenses are."

Aronson added that there is a "great deal of confusion in terms of what the goals of the organization should be. Should it be a strong organization? Yes. Does it have a way to go? Yes. We still have to figure out what we want of the organization."
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April 25, 2001

Federation Leadership Meets to Move the System Three Giant Steps Forward

North American Jewish Federation lay and professional leaders convened in Washington, D.C., April 22-23, and made significant progress on three issues critical to the current and future success of the Federation system.

In less than 48 hours, Jewish leaders agreed to initiate an immediate and ongoing (\mathbf{i}) response to Israel's needs in its protracted state of crisis. They also embraced a Vision (2) and Strategic Goal-setting process that will, in the span of six or seven months, solidify the UJC/Federation system's aspirational goals and actual programs to achieve them. Finally, they began a process to determine a fair share formula for financing the system's (3) national agency, United Jewish Communities.

Israel Now Solidarity Initiative

A proposed Israel Now Solidarity Initiative received resounding approval during an emotionally charged plenary session keynoted by Rabbi Michael Melchior, Israeli Deputy Minister of Foreign Affairs. Acknowledging North American Jewry's deep level (1) of care for the Jewish state, and elaborating on many of the subtleties of the conflict there, Melchior said: "We need to get the complexity of the issues into those communities we may have fallen out of touch with, especially the college campuses [...] It is important for leaders to provide leadership about the caring."

The adopted Initiative responds in every way to Melchior's challenge, including national educational and advocacy components as well as a grassroots fund-raising effort. To raise public awareness, and to express the unequivocal commitment of the North American Jewish community to the people of Israel and the Israeli homeland, the Initiative calls for a National Solidarity effort, starting this summer with transcontinental rallies. [Details of the rallies are in development at this time.]

"The conflict has evolved into a crisis of which we are all deeply concerned," said Charles R. Bronfman, UJC Chairman. "A National Solidarity effort will underscore to the citizens and government of Israel the unbreakable bonds of support that always have and always will exist between North American Jewry and Israel."

"Ever since the current conflict between Israel and the Palestinians began last fall, North American supporters of Israel have been searching for a way to boldly express their solidarity with Israel," said Joel Tauber, chairman of the UJC Executive Committee. "This is the opportunity."

This paper neverals stupidity, a hypocrisy, a self-hypnosis. Do they really think they are meeting "Israel's needs in its protraced state of needs "?

WHO and HOW CAN The UJC be juited into reality ?



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"The rallies will be a visible, demonstrative and emphatic statement of support sent to Israel and the Israeli government, and a strong statement of support of Israel heard by Americans, the U.S. government and the world," said Karen Shapira, chair of the UJC Israel and Overseas Pillar.

In closing remarks, UJC President and CEO Stephen D. Solender emphasized the diversity of the Solidarity Initiative—including planned mega missions—and the fact that the planned rallies are just the beginning: "The need for this initiative is immediate. It is a way of saying to Israel, 'We are with you in as many ways as we can be. The entire Federation system is ready to respond to your needs.""

UJC Strategic Vision and Goals

Solender also addressed other issues that lay and professional leaders discussed during their two days of meetings. "From these conversations with Federations, we understand that the development of UJC's Vision and corresponding Goals and Initiatives is what they've been wanting us to do."

Federations had met in city-size groups to discuss a new, proposed Vision statement for UJC, overarching Goals generated by the Pillars, and a slate of proposed major programs that would set UJC's direction going forward (in addition to its ongoing programs and the services it already provides). It was generally agreed that the Goals and Initiatives were on target. A newly-formed Strategic Programs and Priorities Committee immediately met to begin the task of vetting the proposed programs down to a single set for approval by the Executive Committee—a process that will continue with federation leaders in coming weeks. Final adoption of a UJC Vision and Strategic Goals and Initiatives will take place at the GA in Washington this November.

Fair Share Financing

The third, and final, piece of business concerned Fair Share Financing. Fair Share Committee Chair Al Ratner clarified topics for discussion and, in relatively short order, Federation leadership re-convened with consensus approval on an approach to developing a fair share financing formula. That approach will be further refined by the Committee and in a <u>series of phone consultations with federations</u> and presented to the Board of Trustees as early as the June 11 Board meeting.

Tauber noted the effectiveness of the close Federation teamwork: "We're very grateful for the positive response to the three major matters discussed here."

And, in his closing remarks, Ratner captured a core reality that seemed to have driven the weekend's proceedings: "Yes, there will be stresses as we seek further consensus. But, let me tell you, stress was when we had a Holocaust and couldn't get people out. Today, we have something our parents and grandparents never had. We have choices. We have a heritage that we inherited from them that will teach us to make the right choices."



Let's Talk

April, 2001

Several days ago, I was honored to have been given the *yichas* to present UJC's wellcrafted, proposed Strategic Vision Statement to Federation leaders. We were gathered in Washington for a series of meetings that, I am convinced, marked a pivotal moment in the history of the Federation system. I found it so inspiring that I read it twice.

United Jewish Communities protects and enhances the well-being of Jews and Jewish communities in North America, Israel and around the world, striving to realize our core values of *chesed* (caring and compassion) and *Torah* (Jewish Learning), *tikkun olam* (repair of the world) and *tzedakah* (social justice). The UJC, as the central address of the federations, acts upon these values through its philanthropic endeavors, its strategic initiatives and its collective leadership—in partnership with local communities, national and international agencies—to strengthen Jewish communities, peoplehood, Jewish learning and living, social justice and *klal Yisrael*.

Now, some may say, "All this *kvelling* over a Vision statement?" And I'll be the first to admit that these words are really an updating and refining of the existing UJC Mission statement, found in the original Newco documents. But this piece of wordsmithing by our Pillar chairs and Carole Solomon, the Campaign/FRD chair, represents the first evidence of our new organization giving voice to its identity. Without an identity, who are we? Without an identity, why should anyone support UJC and the vital work we do?

At last November's GA, in Chicago, I talked about visioning conferences and the need to define some big ideas that would tug at the hearts and minds of our people, and produce results that save and enhance the lives of Jews everywhere. Out-of-the-box thinking that would take advantage of the opportunities we have today—because the fact that today we Jews have more affluence and influence than ever before in history defines the modern era of world Jewry.

Well, our Pillar Chairs and Carole Solomon took it from there. In January, they invited Joel Tauber, Chairman of our Executive Committee, Steve Solender, UJC's President and CEO, and me to a meeting. We were thrilled to discover that the Pillars were working as a creative team, within the boundaries of the original Mission Statement.

At our second meeting, on March 25, I was proud to hear about these inspiring, proposed Strategic Vision and Goals for UJC. They had developed this approach based on UJC's first 18 months of experience and learning, and an understanding of the challenges and opportunities facing the Jewish community in the future. And they had done a whole lot more. They had developed a Strategic Vision and Goal-setting process—a mechanism for making our vision real—along with an initial proposal of what I believe are big but achievable goals.

You see, originally, UJC envisioned four Pillars. But, based on actual operating experience, Campaign/FRD determined that it had a unique relationship to the other three. They realized that future Campaign/FRD initiatives would be reflective of ideas generated by the other Pillars.

It's the role of our Pillars, representing our core concerns, to generate UJC's vision and goals, then to define actual programs, or initiatives, to put those goals into action. Campaign/FRD has

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the lead responsibility in developing innovative strategies and tactics to make sure that there are philanthropic resources to fund those initiatives.

The funding comes in through the Annual Case for Giving, Planned Giving and Endowment, Supplemental Giving and Venture Philanthropy. The Trust for Jewish Philanthropy also plays a critical role, working with federations to fund some of these big ideas by identifying major philanthropists whose interests align with our UJC vision.

So, in Washington, we came together as a system, and began to discuss these major goals and specific initiatives that will guide us for years to come. Based on the progress we made, and the dialogue we enjoyed in plenary and discussion groups, we are in very good shape to be able to have the Board of Trustees vote on them by this November, at the GA.

Back to what I was saying about identity. You see, once we can say, "These are the goals that UJC stands for" – goals that people can really get their hearts and their hands around, goals like "UJC strives to ensure that no Jew goes to bed hungry and that every Jew has the chance to live a life of dignity" or "UJC trains and develops future leaders to sustain the continued vibrancy of Jewish communities," then we'll discover that there are more—many more wealthy Jews in the world who would be willing to fund these goals. I am talking about people who may have already given to the Annual Campaign but also are looking for more specific ways to target their philanthropy.

Goal-setting was just one of the three issues we had before us. We also had truly constructive discussions on Fair Share Financing. My colleague, Albert Ratner, Chair of the Fair Share Committee, tells me that the feedback we received on an approach to developing a Fair Share Financing formula gives us enough of a start to have a thorough airing of our progress at the Board of Trustees meeting in June.

But the emotional highlight of our meetings came at our plenary on the proposed Israel Solidarity Initiative, led by Joel Tauber, Bob Schrayer, our 2001 Campaign Chair, and Karen Shapira, Chair of our Israel and Overseas Pillar. The Initiative is composed of education and advocacy efforts (with a strong focus on college campuses), grassroots fundraising, a national awareness component that currently hinges on a Solidarity Rally or rallies, and a megamission. Leader after leader took the microphone to give voice to our system's urgent need to express itself in solidarity with Israel.

Israelis need us now. They need every aspect of our support during this difficult time. If not now, when? If not us, who then? We must show the Israelis as well as Jews and non-Jews around the world that we stand in solidarity with our friends, our family, our people in Israel. That is what Jewish values are all about.

May we meet again this summer in Jerusalem.

Charles R. Bronfman, Chairman, United Jewish Communities





FORWARD

MAY 11, 2001

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Tisch, Critic of Advocacy Groups, Eyed To Head Former UJA

By JULIA GOLDMAN FORWARD STAFF

A New York philanthropist and communal leader who has criticized local organizations for their "out of touch" stances on public policy issues may soon get to play an even larger role in the national Jewish life.

James Tisch appears to have emerged as the top candidate for chairman of the United Jewish Communities, the national network of Jewish community federations. Mr. Tisch is a member of a wealthy New York family with broad philanthropic interests and considerable business holdings, including a tobacco company.

He serves as the president of UJA-Federation of New York, the country's largest local Jewish philanthropy. He assumed the New York post four years ago over the vociferous opposition of anti-smoking activists.

Mr. Tisch reportedly was asked this week to take over as the UJC's board chairman from billionaire Charles Bronfman. Mr. Bronfman's two-year term ends in November.

The UJC also must fill the post now held by Detroit businessman Joel Tauber, who serves as chairman of the UJC's executive committee. Robert Goldberg, a banking executive from Cleveland, is said to be the leading candidate to replace Mr. Tauber.

Should Mr. Tisch accept the UJC's invitation, he may face a new round in a communal debate over how Jewish organizations treat donors whose money comes from what some see as unseemly or immoral sources. That debate ignited anew earlier this year when it was disclosed that Marc Rich, the fugitive billionaire and recipient of a controversial presidential pardon, was a major donor to Jewish causes.

Mr. Tisch's potential chairmanship also could influence the 18-month-old UJC's programmatic mission, which only recently has begun to take shape. Last year, at the insistence of Mr. Tisch and several other federation leaders, a Jewish public policy group funded by the UJC agreed to shift its efforts away from national policy and to refocus on local social-action projects and leadership training. Mr. Tisch and Stephen Solender, then professional head of the New York federation, charged at the time that the policy group, the Jewish Council for Public Affairs, was "out of touch" with mainstream Jewish opinion on several key policy issues.

2

Some JCPA members felt the move was an attempt by its funders to exert control over its work. But the group's president, Leonard Cole, recently told the Forward that the reorganization spearheaded by Mr. Tisch actually strengthened the council. "The JCPA's role on behalf of the Jewish community, in my judgment, is far more effective today than it had been in the recent past," Dr. Cole said.

Sources said Mr. Tisch was chosen from among some 20 individuals considered by the nominating committee, which operates in secret. He is reportedly one of only a handful of candidates approached regarding the position.

Mr. Solender, who is now the president and chief executive officer at UJC, said it was "premature" to discuss the status of the search. "The deliberations of the nominating committee are private, and they are in the middle of deliberations right now," he said. "We hope to be making decisions very soon."

The nominees for the two positions should be announced in time for a June 11 board meeting in Chicago, he said.

A philanthropic behemoth, the UJC was formed in 1999 through the merger of the United Jewish Appeal, the United Israel Appeal and the Council of Jewish Federations. During their tenures, Messrs. Bronfman and Tauber have presided over a turbulent period of administrative adjustment and budget cutting.

Mr. Goldberg, who was the UJC's first treasurer and is the chairman of its Overseas Needs and Assessment Committee, said he believed he was one of a number of people being considered for the job. "I have heard nothing," he said, but remains interested in the job.

Mr. Tisch declined to speak on the record about his potential appointment to the UJC.

Some observers said Mr. Tisch was not likely to accept the post. He recently stepped down from the board of the Trust for Jewish Philanthropy, an offshoot of the UJC, citing a busy schedule.

Two of Mr. Tisch's most outspoken critics, the philanthropists Edith and Henry Everett, expressed dismay that the owner of a cigarette company would even be considered a candidate to lead the national organization of 189 federations.

"How could the UJC in meetings and publications say they speak in a moral voice?" Mr. Everett asked. "This man violates every rule of ethics" by producing and marketing cigarettes, which, Mr. Everett said, kill upwards of four million people a year.

"It makes me want to resign from Jewish life," Mr. Everett said.



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JTA Daily News Bullctin

2

Source: James Tisch tapped for top national Jewish post

Iulie Wiener

NEW YORK (JTA) — The United Jewish Communities has offered its top volunteer position to the president of North America's largest Jewish federation.

According to a member of the UJC nominating committee, James Tisch of New York has been asked to replace Charles Bronfinan as UJC chairman when Bronfinan steps down in October.

Tisch, the president and CEO of Loews Corporation, apparently is looking into the matter and is expected to give an answer in the next two weeks.

Tisch declined to comment. UJC officials similarly declined to confirm the nomination, saying they had been "talking to a whole host of people to see who's interested."

Officials and several committee members say the process is supposed to be secret to avoid offending future candidates, who could learn that they were offered the position only after someone else declined.

In addition to Tisch's own involvement with UJA-Federation of Greater New York, his parents, brother and wife also are well known in the Jewish philanthropic world, where the Tisches are considered "mega-donors."

Tisch has a reputation for being a decisive person and a strong writer with little patience for process.



As president of the New York federation, Tisch has been spoken in pressing the Jewish Council for Public Affairs, an ibrella group that aims to coordinate Jewish activism on a range of social and political issues, to narrow its agenda and focus on issues of direct concern to the Jewish community.

Ilis business ties have proven controversial however.

Loews owns the Lorillard tobacco company, and some board members of the New York federation objected when Tisch became president.

However, many Jewish leaders defended Tisch, saying that excluding leaders and donors because of their business interests would lead to a "slippery slope" whereby philanthropists could become mired in controversy over a wide range of businesses and practices.

Bronfman, the UJC's current chaiman, is a former owner of Seagram a liquor company that recently was sold to a French media company.

The issue of whether Tisch's tobacco interests might damage the UJC's image apparently was raised during discussions in the nominating committee, a member said.

In addition, some members were concerned over Tisch's lack of experience in UJC matters.

However, the committee decided that the positive qualities Tisch would bring to the job outweigh his negatives, according to the committee member.



The nominating committee also is seeking a replacement for No 2 lay position — chair of UJC's executive committee — to lace Joel Tauber, who also is stepping down in October.

Robert Goldberg of Cleveland --- UJC's immediate past treasurer and the chair of its Overseas Needs Assessment and Distribution Committee -- is the apparent favorite, according to several sources. Goldberg, who is president of the Cleveland federation, said he had not been offered the position.

"If the community feels they want me I would do it," Goldberg said. "But if I don't get it my feelings won't be hurt."

Holocaust denier is denied a chance to debate at Oxford

(SUN) 5. 13' 01 23:32/ST. 17:22/NO. 4261235425 P

By Richard Allen Greene

LONDON (JTA) — A student group at Oxford has canceled a debate on freedom of speech that was to feature Holocaust denier David Irving.

The Oxford Union, a debating society, decided to call off the event at the last minute after intense pressure from a range of groups, including the Union of Jewish Students, the Anti-Nazi League, the Association of University Teachers and Oxford's own Student Union.

The Anti-Nazi League, which had planned protests at the debate, originally scheduled for May 10, hailed the cancellation as "great news."

"It would have been horrendous for David Irving to get to speak in Britain," league spokeswoman Debbie Jack said.

The debate was to address the question of whether there should be restrictions on the freedom of speech of extremists.

Irving was scheduled to argue against restrictions, while Richard Rampton, one of the lawyers who successfully defended Holocaust scholar Deborah Lipstadt from Irving's libel lawsuit last year, was to argue in favor.

David Mitchell, a Jewish student at Oxford, coordinated campus opposition to the event.

After distributing leaflets and pressuring other members of the panel to pull out of the debate, he put motions to the Oxford Union condemning the Irving invitation and demanding that it be canceled.

At a four-hour meeting on May 8, students voted 95 to 15 in favor canceling the debate, union spokesman Daniel Johnson said.

Under union rules, the votes were not binding on President Amy Harland.

She said she would announce her decision on the morning of May 9, the day before the event was to take place. At 1 p.m., a notice went up saying that the event had been canceled.

"To see it happen at the 11th hour was spectacular," Mitchell told JTA. "It's not easy to cancel something like this at the last minute," he added.

This is the third time in recent years that Oxford has canceled a planned Irving appearance. But Johnson said that having him participate in a free speech debate was different.

"He was not coming to discuss his beliefs, but to participate in a debate with vigorous opposition," he said.

The Board of Deputies, the umbrella organization that represents most British Jews, does not accept the distinction.

"By giving him a platform, whatever the topic, you are giving him a legitimacy that he did not have after the libel trial," a Board spokesman said.

In a highly publicized London case last year, Irving lost his lawsuit against Lipstadt for calling him a Holocaust denier.

In his ruling, the judge found that Irving "is a Holocaust denier, anti-Semitic and racist, and that he associates with right-wing extremists who promote neo-Nazism." ONT PAGE LATEST STORIES SEARCH ARCHIVES GET UTA DIRECT

WHO WE ARE MEET OUR STAFF WHAT DO YOU THINK? HOW TO SUPPORT US Cleveland exec tapped for top post amid leadership reshuffling at UJC By Julie Wiener

vice of the Jewish People



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NEW YORK, June 5 (JTA) — In what is being called a longterm "succession plan," the executive of the Jewish Community Federation of Cleveland has been tapped to succeed Stephen Solender as the top professional at the United Jewish Communities.

Cleveland's Stephen Hoffman will likely replace Solender, who retires in 2003. But he is expected to join the North American federation umbrella group in the near future, running it's day-to-day operations before that, said Joel Tauber, chair of the UJC's executive committee.

Hoffman declined to comment, saying discussions were still ongoing.

Solender said he is pleased with the new plans, and that he expects to focus on special projects and ensuring a smooth transition while Hoffman assumes responsibility for the UJC's operations.

The latest development comes two years after Solender was hired, following a lengthy search process. At that time, Solender, now 63, told lay leaders that he would stay only until he turns 65, Tauber and Solender said.

However, in recent weeks, rumors had circulated that Solender was being pushed out under pressure from James Tisch, who has been invited to become the UJC's next chairman of the board.

Tisch, currently president of the UIA-Federation of Greater New York, was rumored to dislike Solender, who is former executive vice president of that federation.

But Tisch, who said he is accepting the offer to be chairman of the board, dismissed those rumors as "<u>patently ridiculous</u>." Solender said the rumor has "no basis in reality."

Tauber said recent discussions over the UJC's top professional position have been limited to himself, Hoffman, Solender and Charles Bronfman, the UJC's current chairman of the board.

"Jim Tisch has had no input, no involvement, no discussion and no influence" in the hiring decisions, Tauber said.

Both Bronfman and Tauber will step down from their volunteer posts in October. Robert Goldberg, immediate past board chair of Cleveland's federation, is expected to replace Tauber.

Hoffman's selection is the latest staffing move at the top echelons of UJC, which is the

product of the 1999 merger between the United Jewish Appeal and the Council of Jewish Federations. Until December, the group had a chief operating officer responsible for many of the day-to-day operations Hoffman is expected to assume, but she left after weeks of negotiations.

The new changes mean that top leadership will be heavily weighted towards New York and Cleveland. New York has the largest campaign, and Cleveland has the fifth largest campaign.

Tisch, the president and CEO of Loews Corporation, was selected because he has "done an absolutely outstanding job in the New York federation on every level," said Daniel Shapiro, the chair of the nominating committee.

Tisch is "an articulate spokesman for the federation system and for making a gift to the federation campaign" as opposed to the current trend toward designated giving to particular institutions, Shapiro added.

Tisch's business holdings — which include the Lorillard tobacco company — may draw some controversy, as they did when he was named to the top post in New York.

While the nominating committee discussed that possibility, Shapiro said, "with the exception of one, maybe two, people, everyone felt that was not really relevant."

"His business is run lawfully and legally and they're functioning in the business world today," Shapiro said. "He's an upstanding citizen and part of a family that's been unbelievably philanthropic."

Goldberg, who has had major leadership roles in Cleveland's Mandel Foundation, as well as the city's federation, has been extremely involved in the UJC's governance. The UJC's immediate past treasurer, Goldberg currently is chairman of its Overseas Needs Assessment and Distribution Committee, which determines how federations should allocate funds to Israel and Jews in other countries.

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HAF BACKGROUND MEMOS

With: Brian Lurie, Yitzhak Rabin & Avrum Burg

54.703, 25

HAF BACKGROUND MEMOS

ARCHIVES

VARIOUS CAMPAIGNS SUGGESTIONS

BACKGROUND MEMOS

- I. LETTER FROM CHICAGO WEXNERITE July 14, 1989 II. SUGGESTION TO BRIAN LURIE January 1993 For UJA Executive Committee to go through a 5 - day Basic Judaism course - Idea turned down due to "bad timing". This was just an excuse, in my opinion. Ш. CONVERSATION WITH PRIME MINISTER RABIN November 19, 1994 (Taking money away from Jewish Agency and using it in U.S. for sending kids to Israel.) Form new entity - CORPORATION FOR THE FUTURE IV. A RECOMMENDATION TO NATIONAL UJA March 14, 1995 Create a 4 - year 500m. second line for Israel Experience -(I never received a response) See next page for list of Second Line campaigns V. A NEW CAMPAGIN - tested on Wayne Feinstein September 21, 1997
- VI. A SPECIAL \$4.0 b. CAPITAL CAMPAIGN April 5, 2000 For 40 Jewish High Schools in the U.S. and Israel, plus Student Aid Fund to lower tuition to \$1,000 per year.

70.

SECOND LINE SPECIAL FUNDS

COUNTRY	YEAR
Morocco	1956
Post-war Emergency	1957
Six-day War	1967
War of Attrition	1967-70
Yom Kippur War	1973
Ethiopia - operation Moses	1986
Operation Exodus	1990-94

\$ AMOUNT 20m 10m 180m 80m 260m 80m 1000m (1 billion)

AMERICAN JEWISH A R C H I V E S

ISRAEL EDUCATION FUND 1964-PRESENT-250 MILLION

UJA INCOME

Share of annual campaign Occasional special funds Wars Large migrations Israel Education Fund

LOCAL COMMUNITY INCOME

Share of annual campaign Special donor – advised Endowment Fund Capital funds for local institutions Schools, centers, synagogue, etc



551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739 Huntington Center Suite 3710 41 South High Street Columbus, Ohio 43215 614 464 2772

March 2, 1993

Rabbi Brian Lurie UJA 99 Park Avenue New York, N.Y. 10016

Dear Brian:

When we met in your office January 26, one of the items discussed, albeit briefly, was the possibility of your Executive Committee holding a meeting in Israel sometime in the summer of '93. I said that the Wexner Heritage "students" and faculty would be in Jerusalem in force July 18-26 (200 persons) and again July 31-August 8 (200 persons).

You suggested that it might be worthwhile for your Executive Committee to go through the five day Basic Judaism course we give to all entering first-year people. We have no entering classes this year, but could easily arrange for that course to be given to your people, if you wanted it.

Please let me know.

As ever,

Herbert A. Friedman

HAF/jf

March 5, 93

Brian called to say the timing was off. we would have to find another dire. I said the offer was permanently valid.

MEMORANDUM

To: Selected Persons below

FROM: Rabbi Herbert A. Friedman

Date: November 19, 1994

Subject: Conversation with Prime Minister Rabin

I. BACKGROUND

On August 1, 1994, I sent a letter to Mr. Rabin explaining a plan I had in mind for expanding the Israel Experience into a truly national movement, supported by a meaningful amount of money. Mr. Charles Bronfman is the father of the phrase and began the effort by research into several communities to create support. He succeeded in planting the idea that exposing American Jewish youngsters to an inspiring and educational experience in Israel could instill pride and strengthen their Jewish identity.

I suggested to Mr. Rabin that here was an opportunity to make a truly historic effort, with the possibility of actually changing a future filled with the danger of disastrous assimilation into a future filled with the exact opposite. It required the courage of "re-engineering" the manner in which we have utilized public Jewish funds during the past half-century.

My idea was to divert the funds which the UJA currently sends to the Jewish Agency {currently about \$200 million} to a new entity, THE CORPORATION FOR THE FUTURE, which would utilize the money for the Israel Experience, and possibly in the future for other items which also come under the category of CONTINUITY, such as Hillel, summer camps in the U.S., and other similar programs. For the moment, however we are dealing only with the Israel Experience.

Since the Jewish Agency would then be short of funds to continue with its work of Immigration, the Government of Israel would have to make up for that shortfall. But even the full amount of \$200 million is not a backbreaking problem for a country whose GNP is currently well over \$60 billion.

Attached to this memorandum is a copy of my original letter to Mr. Rabin.

The letter was hand-delivered by Ambassador Itamar Rabinowich, who has been very helpful in expediting Mr. Rabin's understanding of the issues behind my proposal, as well as the proposal itself.

II. MY VERBAL PITCH TO MR. RABIN ON NOV. 19, 1994

- 1. There is danger facing U.S. Jewry, not physical, but an identity crisis.
- 2. The leadership individuals and institutions are conservative by nature and slow to change.
- Israel today is strong enough to serve as an instrument which can help U.S. Jewry.
- 4. You personally are strong enough to make such a sea-change.
- 5. You must re-engineer {and I gave him a copy of Hammer's book}.

III. HE LISTENED and UNDERSTOOD

IV. HE ASKED QUESTIONS

- Q How do we know that the \$200 million won't go back to the federations for their local expenses?
- A The money is given to the CORPORATION by the UJA, for the specific purposes stated in the incorporation papers, namely, the Israel Experience and other continuity programs.
- Q How can we do this only for the American Jews? It would have to be world-wide.
- A By all means. If the Keren Hayesod countries wanted to do the same, you would have to accomodate them as well.
- Q What will the Sochnut say ?
- A They won't like it, but something has to suffer. You have to decide what is more important. It's a trade-off.





V. MY SPECIFIC PROPOSAL TO HIM

- 1. Form the CORPORATION {I gave him a draft list of names}
- 2. Obtain tax-deductibility for it.
- 3. Put two or three Israelis whom you trust on the board.
- In the interest of gradualism, let the UJA transfer \$50 million to the corporation, and year by year increase, up to the full amount, whatever that might be.
- 5. The corporation would set up a small staff to get started on two projects:
 - a. ascertain the number of young Jewish people in all U.S. communities in four age categories - 10 through 13; 14 through 18; 19 through 22; 23 through 26.
 - b. take an inventory of facilities available in Israel for use in each age category {i.e. summer camps, field schools, army installations, kibbutzim, youth hostels, empty schools near universities, etc., etc.) This will begin to give us some idea as to the need for additional infrastructure required.

VI. HIS REPLY

- 1. No doubt something has to be done.
- 2. Your idea of gradualism is good.
- 3. I want to talk to some people in the Sochnut lay leaders, not professionals. {I asked for the name of the next chairman - he said perhaps Shoshana Cardin.}
- 4. You'll hear from me. {I asked when he smiled and said: "I have a few other things to do."}

Distribution: Leslie Wexner Charles Bronfman Edgar Bronfman Brian Lurie Martin Kraar



<u>A RECOMMENDATION TO NATIONAL UJA</u> at the Executive Committee Meeting - March 14, 1995 from Rabbi Herbert A. Friedman, who served UJA for 34 years as Volunteer Speaker (7), CHIEF EXECUTIVE (20) and Paid Speaker (7)

Thanks to Rabbi Brian Lurie, who invited me to appear here.

Thanks to Charles R Bronfman, who invented the slogan "Israel Experience" and pushed it for the past 4 years.

I. INTRODUCTION

1. You must look at danger without fear, but with an analytical eye, so that you recognize it when you see it, and face it with confidence that you will find the means to overcome it, as you have done so nobly for the past half-century.

There is great danger now - for we are losing people at an awesome rate

- 2. Israel, in broadest sense, consists of 3 elements:
 - a. faith
 - b. land
 - c. people
- 3. If we lose the people in the Diaspora, we lose the faith and also a source of strength for the land.
- We have an emergency as serious as any war.



II. <u>THE UJA IS THE NATIONAL TREASURY OF AMERICAN JEWRY</u> <u>AND BEARS AN HISTORIC ROLE - BUILDING A STATE AND</u> <u>SAVING PEOPLE</u>

1. To do this we always ran Second Line campaigns:

SECOND LINE FUNDS

1956 -	Special Fund	Morocco (\$20 m)			
1957 -	Emergency Rescue Fund	Oct 56 War (\$10 m)			
	AKCHI	Hungarian Refugees			
		Egyptian Refugees			
1958 -	Emergency Rescue Fund	(Same as above) (\$?)			
1967 -	Emergency Fund	Six Day War (\$180 m)			
1968 -	Emergency Fund	War of Attrition (\$80 m)			
1974 -	Emergency Fund	Yom Kippur War (\$260 m)			
1986 -	Operation Moses Ethiopian Airlift (\$80 m)				
1990-95	Operation Exodus	Russian Migration (\$1 b)			

2. Even in a non-war situation, we ran a separate campaign for the ISRAEL EDUCATION FUND. This raised \$250 million and built 777 schools and other institutions from American donors.

 Once again, we must do the same thing - SAVE OUR YOUTH FUND or some similiar title.



III. NATIONAL INITIATIVE vs. INDIVIDUAL PLANS

- 1. If the UJA doesn't act, on a large financial scale and with good planning, both on the program side in Isarael and on the youth recruitment side in the U.S., the communities, with all the good intentions in the world, will produce an inferior result.
- 2. Ft. Lauderdale, with its own second line (and 75 other communities, according to Peter Geffen of CRB) are already trying to create local programs, beacuse they are sensitive to the need.
- 3. UJA must get ahead of the curve and lead it, because you can best create:
 - a. a national mood of urgency;
 - b. momentum
 - c. many varied Experiences in Israel; and
 - d. you can raise much more money than the total of all the individual efforts

IV. EMPHASIS ON MARKETING IS MIS-PLACED

- 1. To try to persuade young people and their families to pay their own way, in whole or in part, through a savings plan, or any other mechanism, will result in small increases in the numbers.
- 2. The cost must be <u>free</u> to the youngster, i.e., borne by the total national treasury, for it is the national responsibility to inspire and educate the national community.

V. AVOID USE OF THE WORD "TRIP"

- 1. A trip is a lovely holiday, vacation, family visit, etc. but it is not necessarily a deep and lasting EXPERIENCE.
- 2. We must develop an inventory of experiences which will make a more lasting impression, teach the values and ideals of Judaism, and perform the magic which we know a well-crafted experience in Israel can almost always achieve. Money will have to be spent on assuring that we have an infrastructure in Israel which can absorb the numbers we are contemplating.



VI. <u>CREATE AN AUTONOMOUS STRUCTURE WITHIN UJA - USING</u> ISRAEL EDUCATION FUND AS A MODEL

(See attached J.T.A. dispatch - Sept. 1964)



GOAL FOR ISRAEL EXPERIENCE

\$500 million in 4 years: 1996-1999 inclusive

1995 Take \$50 m from 1995 regular campaign and put it in an 1. Israel Experience special account Obtain commitment of \$50 m from the mega-group at its 2. May 5-7 meeting 1996 Take \$100 m from regular campaign and put it in I.E. account 1. 2. Raise \$100 m on Second Line 1997 Take \$100 m from regular campaign and put in I.E. account 1. 2. Raise \$100 m on Second Line 1998 Take \$50 m from regular campaign and put in I.E. account 1. 2. Raise \$50 m on Second Line 1999

- 1. Mop-up on Second Line pledges
- 2. Major effort to mop-up on cash collection

ADDITIONAL SOURCES IN CASE OF NEED:

VII.

- 1. Return to mega-group (Remember Exodus I and II)
- Community endowment funds, through approach to individuals who can be asked to "recommend" that specific amounts of their moeny be given to I.E. Fund.
- Israel Government to support Jewish Agency, if needed, to replace funds taken from regular campaigns.

CAMPAIGN PLAN



IX. <u>A WORTHY RESPONSE</u>

- 1. If UJA doesn't make an extraordinary response, history will judge UJA's future to be unworthy of its marvelous past achievements.
- Such a failure may well cause an erosion of UJA's status. It may appear to be weak rather than strong. It may slowly decline in importance and income.
- 3. I know that the UJA can find the inner resolve to meet this emergency can combine proven old methods of second line campaigning with new methods of presenting its case to the caring portion of American Jewry, which <u>will</u> respond to a call to rescue its own young generation and thus the future of the whole Jewish people. We are at a turning point in American Jewish history, and you must decide to meet the challenge. You can do it.



THE JEWISH AGENCY FOR ISRAEL DATE: January 1, 1995

DESCRIPTION	PROJECTS WITH AMERICAN DONORS	PROJECTS WITH NON-AMERICAN DONORS (KEREN HAYESOD)	TOTAL	
SCHOOLS High Schools & Colleges	AMERIC	AN IEWISH	193	
SPORTS FACILITIES	A D C	H ²² VES	47	
COMMUNITY, YOUTH	106	94	200	
LIBRARIES	33		437	
PRE-KINDERGARDEN	S 304	58	362	
PRE-KINDERGARDEN Nurseries	176	91	267	
TOTAL:	777	329	1106	
	: 1964-PRESENT:	py	\$250 \$100 \$350	

ISRAEL EDUCATION FUND

ISRAELI REACTION TO IDEA OF SPECIAL FUND FOR ISRAEL EXPERIENCE

A la Exodus For Russian Immigrants

AMERICAN JEWISH

ARCHL

A. 100, "



RABIN AND BURG (CHAIRMAN OF JEWISH AGENCY) -Both men enthusiastic -I had proposed it to UJA Executive Committee March 14 and got no response 551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

March 19, 1995

Rabbi Brian Lurie UJA 99 Park Avenue New York, NY 10016

Via fax: 212-818-9413

Dear Brian -

Excellent meeting with Eitan Haber this morning. He is enthusiastic about the idea of a second line campaign. I told him you wanted a letter from Rabin. He asked me to give a draft. Instead I gave him a page of notes. He endorsed it, and asked a member of his staff to prepare a letter for Rabin's signature according to the notes.

He understands and agrees with taking an allocation from the regular campaign. I made no reference in my notes to that fact, but I explained my concept orally.

Bottom line – he and the P.M. have a very positive attitude toward the special campaign.

We talked about developing programs here which will be exciting for the young people. He has already spoken to the army about hosting 5000 kids. They agreed to do so, if ordered by the proper authorities.

Will see Burg tomorrow and send another fax.

Best regards,

Rabbi Herbert A. Friedman

The Wexner Heritage Foundation

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

Notes from Rabbi Herbert A. Friedman

March 20, 1995

Rabbi Brian Lurie UJA 99 Park Avenue New York, NY 10016

Via fax: 212-818-9413

Letter from Prime Minister urging UJA to undertake special campaign on national basis, in support of an Israel Experience for American Jewish young people, in the ages of 15 to 25.

Purpose:	to strengthen their Jewish identity
	To create links with the land and people of Israel
	To increase their pride in the Jewish heritage
	To expand their knowledge of the eternal destiny of Judaism

Scope: to raise the largest amount possible, in a multi-year campaign, to send the largest number of young people. The Prime Minister, speaking at the General Assembly of the CJF in Denver in November 1994, used the number of 50,000 Jewish youth annually from the United States.

Example: The special Exodus campaigns in the years 1990-1995 with a goal of \$1 billion, for the purpose of supporting the migration of a half-million Russian Jews.

Time for decision: Now, since the UJA Executive Committee has already started the discussion at its meeting on March 14, 1995.

World – wide: Prime Minister is urging World Keren Hayesod to undertake a similar campaign.



	Notes from Rubbi Herbert A. Friedman 3/20/85
di	
	FOUR SEASONS OCEAN GRAND
-	Palm Beach
	A FOUR SEASONS · REGENT RESORT
	RABY BRIAN LURIE
-	WHITED JEVISH APPEAL
-	29 PARK AVENUE
	NEW YORK N.Y. 10016 (?) 10 (A)
-	to a a
_	Telephone: 212-880-1400
	AMERICAN JEWISEN CORTIN
	Fax: 212-818-9413 02'10102
	Letter from Prine Minister urging UJA to undertake special
	campaign on national basis, in support of an Israel Experience
	for American Jewish young people, in the ages of 15 to 25.
2	Purpose: to strengthen their Jewish identity
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	to send the largest number of young people. The Prime Minister speaking at the General Assembly of the CJF in Denver in
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	Exadus with a goal of 1 billion
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	Jews,
-	
,	Time for decision : Now since the UDA Executive Committee has already stated
	The discussion at its meeting on March 14 1985.
	World wide: Prime minister is wrging blord Keren Huyesod to undertake

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

March 20, 1995

Rabbi Brian Lurie UJA 99 Park Avenue New York, NY 10016

Via fax: 212-818-9413

Dear Brian -

Wonderful enthusiastic talk with Burg this morning. He was very grateful to you for everything you did for him. And he and I hit it off beautifully. Now as to essence:

- Re: <u>Second Line</u> for Israel experience he was vigorously in support; offered help in whatever way you required it; asked when decision would be made; wants action as soon as possible. I went over with him the notes I made for the UJA Executive Committee last week, and he saw immediately the concept of taking off some money annually. He didn't even blink.
- External sources of funds: He has some ideas of generating money, because he knows his share of UJA and U.S. government through UJA will diminish, and says that if he can indeed generate outside money (through an Israeli magbit; an international Mifal ha-Payis; Claims Conference; etc.) he doesn't care if UJA takes off money in order to spend it on Israel Experience.
- He wants to come to mega-meeting May 5-7, to generate support for the Second Line, because his enthusiasm is running so high, he can hardly sit still.
- 4. He also wants desperately for the mega-group to make its decision on supporting a Heritage – type program in Israel because he wants to "save souls for Judaism" in Israel, as well as in the U.S. And he could support that project also, if he were to present. If not present, he will still do anything your want to indicate his position on both items.
- He wants to discuss with you the target goal of the Second Line campaign. He asked when you were coming next to Israel, and I said I really didn't know.
- 6. It was a win-win conversation.

Best regards,

Rabbi Herbert A. Friedman

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

Rabbi Nathan Laufer Via fax: 212-751-3739

Dear Nathan,

Very good talk this morning with Avrum Burg. He is extremely bright, quick energetic and could make an excellent president of Wexner Heritage Foundation (just like you!). We really hit it off. Now to the essence of the conversation:

- He accepts in principle Saturday night July 15, and would bring his family for the weekend, but his summer schedule is not totally clear. He will know in 2 ½ weeks. It is certainly worthwhile waiting (of course, in the meantime start thinking of a fall back person). My feeling is he will try every maneuver to make himself available.
- 2. He is enormously eager for us to bring <u>WHIP</u> to reality. I told him you were presenting the case at Mega-group May 5-7. He said, "I'll come, I'll come to give support" because he will be in N.Y. May 1-2. For meeting of World Jewish Congress. He almost shouted "We need your program here we have to make Jews here. We need a national seminar group. I will get you 20 super people here and I will persuade them to learn Judaism. I want to be, I must be your partner," etc,etc.
- He is completely understanding of second line campaign for operation Israel. Also, he has ideas of creating sources of income if we take away 50 m. for operation Israel. He is really a broad thinker.
- Then he said: "We have a deal." You make me a partner in <u>WHIP</u> and I'll let you take away for Operation Israel. It was win-win.
- 5. I'm sending Brian a fax with the essence of paragraphs two and three above.

Best regards to everyone,

Herb

P.S. He asked for the "numbers" on our program in the states. By that I think the following is what he meant.

- Names of cities, with number of students in each. Such a list can include current and alumni without distinction. Add the total of cities and students.
- Names of faculty. You can't give him absolutely everyone (eliminate those we used infrequently – such as Chazan, Sachar, etc.) and do include the Israelis whom we use steadily (Ravitsky, Simon, Paul, etc).
- Send the curricula currently being used in Denver, Phoenix and San Diego.

Fax him all this, plus a copy of our proposal on <u>WHIP</u>. It might be a total of many pages, but so be it. Amen.

Herb

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THE WEXNER HERITAGE FOUNDATION

551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

614-415-7240 FAX #: Number of Pages (including cover sheet):____ Herb Friedman Memo on Avrum Burg FROM: Message: I've boxed the thoughts and opinions which show meet his ideas jibe with mine. That's why I recommended him to you. Please call me to morrow between 12.30 and 3.30, if possible.

Avraham Burg: Radical conservative or conservative radical?

Shifra Paikin Abramson

head of the Jewish Agency for Israel and World Zionist the Organization - a capacity in which he has served since 1995 after a seven-year stint in the Knesset -Avraham Burg has imbued the organization with a new vitality and energy. What's more, he has presided over a radical redefinition 7 of the Agency's goals, a process that augurs an irrevocable change in the relationship between Israel and world Jewry.

Dynamic, outspoken, and exud-

ing an aura of youthful irreverence, he gracefully embraces seeming contradictions. Although he wears a knitted kipa - which in recent years has become the symbol of the national-religious camp with an increasingly rightist orientation - he has long been identified with the left side of the political spectrum An observant Jew, Burg has been one of the prime movers in

the battle to grant recognition to the Reform and Conservative movements in Israel. And he is living proof of just how misleading lation and widespread alienation

stereotyping can be.

"On matters of peace, I'm a leftist," he says, "ready to pay heavy, even painful, prices for peace. But not necessarily on other issues. On issues such as Jewish identity or restitution of Jewish property [a cause he has championed vociferously], I am very right-wing. I have a foot in every camp."

Indeed, under his leadership, Jewish identity education, both in Israel and abroad, has become a top priority for the Jewish Agency. His concern over growing assimi-

from Judaism has motivated him to draft a new agenda for the Zionist movement - what he terms a "New Zionism" - which seeks the preservation of the Jewish people and the continuity of Judaism by providing

"the definition of universal Jewish content." "He would like to see, "alongside

various religious communities in Israel, the building of a secular society that is humanistic, pluralis-

tic, democratic or, in a word, more Jewish.

Mainstream Judaism has historically been very pluralistic," he explains. In contradistinction to the religious parties' struggle to anchor Jewish observance in legislation, Burg contends that coercion will engender neither faith nor observance.

On the contrary, separation of church and state is essential, he maintains, to prevent "religion from being destroyed by politics and to keep Judaism from becoming a divisive element that alienates Jews from each other and their culture."

"I am not willing to accept a secular parliament's imposition of selected pseudo-religious standards on an unwilling public. Much more can be achieved when religion is left to individual choice," he declares.

Is there any way, then, of ensuring the continued Jewish character of the State of Israel? "All the while there are people willing to struggle anew against stagnation and stagnation in religion is unavoidable - there will be Jewish identity." he stresses.

But this necessitates a constant process of "renewal" or "renovation" - to make Judaism relevant also to those "who don't observe Shabbat or kashrut," to address the changing status of women, and to ensure that the secular community continues as a partner in the collective Jewish memory.

Gravely concerned over the growing religious-secular divide, Burg says, "I think one of the greatest tragedies that has befallen the national-religious as well as the haredi community is its growing insularity," he laments. "The shtetl has returned. It's our people, in our schools, in our neighborhoods, in our youth movements, in our army unit, our university, our settlements. They don't know there are other people in the world."

Parallel to his efforts to bridge the secular-religious gap, he propounds an equal partnership between Israel and Diaspora Jewry based on the common thread of deepening Jewish education and studying the Jewish heritage - a sharp departure from the classic Zionist attitude of shlilat hagola (negation of the Diaspora).

"If a person isn't Jewish, he can't be a Zionist," explains the head of the Zionist movement. "To create people with an identity, we must make them Jewish. They will be more connected to Israel and will make aliya. The same instrument that will combat assimilation will also bring aliya from the West."

WEEK ENDING AUGUST 29, 1998 Jerusalen Post Int'l Edition

ESTABLISHING WEXNER HERITAGE PROGRAM IN ISRAEL

I. Paper from Uri Gordon February 17, 1993

II. Letter from Daniel Gordis July 21, 1998

7007 -

III. News Article Highlighting Low Israeli Morale September 20, 2000

הסוכנות היהודית לארץ־ישראל The Jewish Agency for Israel המחלקה לעליה וקליטה Department of Immigration and Absorption

לשכת ראש המחלקה Office of the Head of the Department

February 17, 1993

Rabbi Herbert Friedman The Wexner Heritage Foundation 551 Madison Avenue New York, NY 10022

Dear Rabbi Friedman,

Though haven't met for quite some time, I have followed your activities in the Jewish community and I know that you are as worried and concerned as we are.

I am enclosing a paper which presents an idea that I strongly believe in and I would very much like to hear your remarks and thoughts on it.

I hope everything is okay with you.

Yours very truly,

Uri Gordon Head Department of Immigration and Absorption


Israel-Diaspora Joint Lobby for Public Action in Israel

Declaration of Intent

Uri Gordon

Introduction

Israel-Diaspora relations need new tools. Those existing today, however important they are, do not respond to the new realities that have arisen in Israel and the Diaspora. This document explains why a joint lobby devoted to public and national activity in Israel is needed. The proposal I have formulated is based on a lifetime of Jewish activity -particularly on my experience as a member of the Jewish Agency Executive -- and on discussions I have held with key personalities in Israeli society.

Israel is a Jewish state and the state of the Jewish people. For this reason, one of its most salient characteristics is its living, special relationship with Diaspora Jewry. Israel has nurtured this relationship throughout its years of existence, clearly aware that the Jewish people is its most reliable and natural ally. However, taking a sober, pragmatic view transcending the ideological perspective, Israel has always treated Diaspora Jewry as a vital, important factor in its economic, social, and political strength. This connection is an existential interest of supreme importance from Israel's point of view.

Everyone perceives and understands that the issue of Israel-Diaspora relations will continue to preoccupy us all, both in Israel and worldwide. The question is how to define the nature of the relations, the extent of responsibility, and the participation of each Diaspora Jew, and his or her involvement in Israeli affairs.

Changes and Erosion in Israel-Diaspora Relations

Today, as the 1990s dawn, it may be stated with certainty that Israel-Diaspora relations are substantially different than what they were only one decade ago. Diaspora Jewry's priorities have changed significantly. Who would have imagined several years ago, for example, that we would witness, these very days, the great exodus of hundreds of thousands of Soviet Jews? Beyond this specific historical drama, we have seen greater and more significant changes in the profile of Jewish leadership. Once directly influenced by the trauma of the Holocaust and the pride and exaltation of the establishment of Israel, Diaspora Jewish leadership is now at a distance from the emotional events surrounding the very existence of a sovereign Jewish state, and the experience and comprehension attached to these events.

The generation that carried the message of Zionism is dying out. In Diaspora Jewish institutions one finds people in their sixties and seventies who still have strong relations with Israel. They know the veterans of Israel's establishment; many have shared roots in this or that Diaspora community and have memories of the Jewish town in Europe. Community activists in their forties, however, have no great emotional connection with Israel. They do not remember the Jewish town in Europe; they were born into a cosmopolitan and much less Jewish milieu.

In the 1980s, too, indications of fissures in Diaspora Jewry's unmitigated support of Israel came to light. The Lebanese War, for example, was one of the first indicators of pluralism in Israeli society and controversy on basic issues. These developments made inroads into the Diaspora community. The intifada had the same effect. The "Who is a Jew" controversy among us is reheated from time to time, to the irritation of many of our worthy Diaspora brethren.

Assimilation and intermarriage continue to gain strength. This self-instigated process of alienation has intensified in the past decade, for reasons including the events of the age (in politics and security) and the way life patterns in the State of the Jews have been coalescing. The common basis of Jews in their homeland and in Diaspora has been dissipating over time. The shared zeide is vanishing. The distance between members of the generations grows with each new generation. The shared folklore and mentality is gradually vanishing. Israeli Jews feel themselves part of the Jewish people through their participation in Israeli parliamentary democracy, and through the war for their very existence, coping with the burden of defense, reserve duty, taxes, and through the constant struggle with unexpected occurrences and incidents. By contrast, Diaspora Jews wishing to retain their Jewishness do so through their synagogue. When they send their children to college, we sent ours to the army. The difference is vast; the mutual alienation is growing. Any number of scholars, both in

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Israel in the Diaspora, have remarked on and written about this phenomenon; conferences and symposia are devoted to it; Jewish leaders decry this alienation on both sides of the ocean. The existence of the gap between us, and the fact that it is growing, is undeniable.

One of the significant indicators of the slackening of ties is the decrease in the percentage of households giving to Jewish charities. A recent survey by the Council of Jewish Federations found that fewer than 50 percent of Jewish households earmark charity for Jewish concerns and purposes; just 15 years ago 75 percent of households pledged to Jewish charities. With the exception of the special "Operation Exodus" campaign, UJA revenues have also been decreasing. While the outpouring of money and concern for Soviet Jewish immigration to Israel has been impressive, it must be pointed out that this is only temporary and reactive. When Soviet aliya dries up, so will the money from abroad, although the financially burdensome absorption needs will continue for some years hence and will preoccupy us in Israel. General UJA/UIA revenues are also hurt by the phenomenon of small, specificgoal campaigns, of which the New Israel Fund is one example. Although these organizations cannot compete with the UJA in scope, their very existence is symptomatic of a situation in which young donors wish to earmark their contributions for a defined, known objective, rather than allowing the "Jewish establishment" to decide their charitable priorities for them.

Institutional Relations - The Situation Today

Relations between Israel and Diaspora Jewry are extensive and bilateral. Although they embrace many diverse areas, they do not provide answers and possibilities on all levels, as will be shown below.

These connections are maintained today by several kinds of agencies.

- a. The competent State authorities, i.e., the Ministry of Foreign Affairs and its overseas legations, one of whose tasks is to represent Israel vis-a-vis the local Jewish community and communicate feedback to Israel. Israel's Prime Ministers, including the incumbent, have a special advisor for Diaspora affairs, and, of course, every former Prime Minister had personal ties with prominent American Jewish leaders.
- b. The Zionist movement and the Jewish Agency, longstanding, institutionalized bodies, have the broadest reach in Israel-Diaspora relations. The Jewish Agency and the World Zionist Organization compose the major financial, organizational, and executive framework for Israel-Diaspora cooperation, which manifests itself in well defined domains such as education, immigration and absorption, welfare, infrastructure and development, and rural settlement. Within this relationship, Israel involves itself in the Diaspora by means of emissaries, teachers, and education; Diaspora Jews' involvement in Israel manifests itself in overseeing the work of the

Agency in its various fields of activity in Israeli society.

c. Jewish communal organizations that maintain Israel offices, e.g., B'nai B'rith, the American Jewish Committee, the American Jewish Congress, the Council of Jewish Federations and others. These organizations maintain a limited presence in Israel by means of their Israel offices, which generally meet the special needs of the organizations that they represent and serve.

There is no doubt that the central and most important vehicle of Israel-Diaspora relations is the Jewish Agency, which, after the Six-Day War, gradually evolved into a highly important and significant forum for Israel-Diaspora cooperation. Since the late 1960s, Diaspora Jewry has been struggling to attain greater involvement, influence, and equality in the management of the Jewish Agency, and its major complaints have pertained to the politicization of the Jewish Agency and the excessive impact of Israeli political parties on Jewish Agency management. This trend has undoubtedly weakened the parties that represent the Zionist side. The party system was forced to make far-reaching concessions in control and management. Diaspora Jewish involvement increased, to the extent of excessive responsibility for Israeli affairs. via the Jewish Agency. This redrawing of forces within the Jewish Agency, leading to greater Diaspora involvement and responsibility at the expense of the other side, has had its successes and failures. It may be hypothesized that without this division of responsibility with Diaspora Jewry, the

Jewish Agency would have come under pressure, criticism, and lack of credibility from the Diaspora side.

What's Wrong with the Existing Situation

The following proposal to establish an Israel-Diaspora public action lobby is made for another reason. The existing situation is problematic in part because the Jewish Agency, the major vehicle for Israel-Diaspora relations, is not empowered to act in many areas of Israeli affairs in which Diaspora involvement is important. The multifarious Israel-Diaspora relationship faces a complex reality without suitable channels of communication; this shortcoming may subsequently damage the fragile tapestry of relations between ourselves and world Jewry.

Diaspora Jewry has negligible impact on public life in Israel. Because it is not geared to articulate its interests and views in Israel, it has no influence on processes within Israel. Any suggestion of Diaspora involvement in Israeli social affairs that comes up is naturally accompanied by a certain sensitivity on the part of both interlocutors.

In fact, there is a kind of unwritten "agreement" delimiting the areas of Diaspora Jewish involvement in Israeli life. It is usually argued that difficult decisions in "existential issues," questions of life and death, should be entrusted to the Israeli citizenry by means of its elected representatives. Nevertheless, it has become apparent in the past few years that Israel may embroil itself in acute and dangerous controversy with Diaspora Jewry over a growing number of non-existential issues. "Who is a Jew" is, without doubt, the most extreme case. If, however, we are interested in placing our involvement with Diaspora Jewry on a more significant and profound level, we shall find many social, economic, and informational issues worthy of cooperation, coordination of positions, and exchange of views. It is of utmost importance to permit Diaspora Jewry to make its views known in Israel. Israel, for its part, must set cooperation on a more serious basis of trust. This attitude is a precondition for a deepening of relations and cooperation between Israel and world Jewry.

American Jews are dissatisfied with the situation, and some of their leaders have articulated this in various forums. The logic lurking behind the issue is that decisions taken by Israel, as arising from the general conception of Israel as a Jewish State and the State of the entire Jewish people, have implications and an impact on the state of world Jewry.

The Lobby - A New Option for the Future

It is important to permit the Diaspora to affect decisionmaking in Israel, not in order to diminish the potency of the State but to strengthen it. It's risky: the Diaspora may speak and act frankly. Some of us may not find this to our liking; we'll meet with some uncomfortable situations. But the silence of alienation that will prevail in the absence of true dialogue and involvement is riskier still.

The world in which we live today is undergoing profound, dramatic changes. Israel and the Jewish people are not divorced from world realities and processes. Only the future will prove whether we managed to analyze this reality

correctly, to assess it properly, and to take the warranted measures with respect to both Israel and the Jewish people.

One thing is clear. This new reality requires reorganization, alternative challenges, and new breakthroughs. No longer is it justified to maintain only the present relationship with the Jewish people in Diaspora. There's no more room for today's status quo. We need to open new avenues of contact, two-way involvement, and genuine, sincere partnership between ourselves and the Diaspora. The establishment of the lobby, as presented below, offers an option of this type, embodying innovation, change, and great challenge.

Summing up:

We dare not retreat into our narrow confines, here in the State of the Jews. I am concerned about the pseudo-Canaanite attitudes and the overstated "Israelism" that characterize some of the Israeli public. To build a better and stronger Israel, we need the Jewish contribution of the Diaspora, not only on the financial level. Israel is going through serious crises. We are slackening; we are disillusioned with the ruling authorities and the legislative system. Movement after movement is born with a bang and ends with a whimper, having neither the patience nor the ideological and practical infrastructure to pursue the exhausting, lengthy struggle against a strong, battle-tested establishment, endowed with tremendous ability to endure in a conservative society.

Israeli society is thirsty for change; all of our public systems need a serious jolt. This lobby has the potential to build an alliance between those interested in change in Israel and those Jews in Diaspora to whom Israel is precious, who are not satisfied with what's happening here, and who are willing to mobilize genuinely for a lobby of this kind. This is not an attempt to set up just another organization or movement that would deal in Diaspora relations. There are existing agencies that can handle this. We are looking for something unique, and our lobby would also engage in problems of Israeli society.

Personally, as a member of the Zionist Executive who knows this arena intimately, I tried to change things from within and persuade my colleagues and the establishment of this need. To my sorrow, I have despaired of the possibility of change from within. However, I believe in this conception and its ability to whet the imagination of leadership groups among us and among our Diaspora brethren. I am also convinced that the need is genuine and urgent. The contribution I want is unique, modest, but highly significant. The intent is not to foment radical change and re-enact Creation, but rather to add a new layer to Israel-Diaspora relations and construct sincere, true, and practical relations for the benefit of the Jewish people.

Attached is a position paper presenting the idea, the structure, and the organization of the proposed lobby. Of course, it is a first draft and a basis for discussion, to be used until the idea coalesces and is implemented in its final form.



Israel-Diaspora Joint Lobby for Public Activity in Israel

Position Paper and Action Proposal - First Draft

General

As is known, AIPAC* represents in the U.S. Israel's interests vis-a-vis the Administration. It closely monitors developments in the U.S. — in both the executive and legislative branches — as they pertain to Israel. In short, AIPAC is the "Jewish lobby" in the United States.

AIPAC's activity is outwardly directed, i.e., aimed at the Administration, its representatives, and U.S. public opinion. It provides information to members of Congress and their aides, and strives, by means of publications and conventions, to keep its own members informed on important and relevant events. When necessary, AIPAC mobilizes its ranks for lobbying activity when specific causes warrant. Even though relations between the American Jewish community and Israel do not fall into the purview of AIPAC's activity and goals, this model is worthy of emulation in that area, too.

A joint forum of Israelis and representatives of Diaspora Jewry should be established in Israel for public social issues, giving tangible expression to the special relations and cooperation between Diaspora Jewry and Israeli society. This lobby would permit Diaspora Jewry to express an opinion, coordinate positions, study and acquaint itself with the

*America-Israel Public Affairs Committee

mutual Israel-Diaspora reality, and provide Diaspora Jewry with a permanent channel for the expression of its interests in Israel — excluding foreign policy and security affairs, of course.

The lobby would give political decision-makers and public representatives in Israel a way to meet with the Jewish community leadership worldwide on a stable, regular basis. Thus the two groups may coordinate positions, help and avail themselves of each other, and — this is the major issue intensify involvement.

The lobby will be, in the beginning, a prestigious, elite body, enlisting Israel's finest in all areas: industry, politics, economics, education, academia, journalism, literature, the arts, etc. The Diaspora partners would be equally illustrious. The lobby's leaders should be prominent personalities, immersed in Diaspora Jewish life and in Israel current affairs. A prestigious group such as this would constitute a task force that could not be disregarded; it would focus attraction and attention in both Israel and the Diaspora. Immediately after its establishment, the lobby would open its membership to, and launch a membership drive among, the general public in Israel and the Diaspora. The goal would be to establish as broad a membership base as possible.

In view of the aforesaid, action should be taken to establish this association, to be named the "Israel-Diaspora Joint Lobby for Public Action in Israel."

The Lobby as a Legal Entity

The lobby should be registered as a public nonprofit association. Although it would be a political entity, it would be non-aligned in terms of affiliation with any party or movement in Israel.

Structure and Management

- Routine management should be entrusted to a directorgeneral appointed for the lobby, assisted by a small auxiliary team.
- The lobby should have a managing committee on which the Israeli and Diaspora members are equally represented in numerical terms. The lobby's constitution should stipulate a rotation of committee members.
 - The lobby should have a constitution and by-laws legally anchoring its areas of activity, powers, and management procedures.
 - Within the lobby, work teams should be set up for specific causes.
- A permanent team should be established for media issues, at least in the first stage, to stimulate Israeli and Diaspora public consciousness in this regard.
- The lobby should have its offices in Jerusalem.

Areas of Lobby Activity

 The lobby should do its best to give Diaspora Jewish leadership reaching Israel, individually or in groups, an opportunity to meet, as needed, with Israeli public representatives for the purpose of voicing or soliciting their views.

- 2. The lobby should act to enhance the understanding and awareness of public representatives in Israel vis-a-vis the world Jewish community, its modus operandi, and its views. This should be done in order to initiate seminars in Israel and in the Diaspora communities, arrange factfinding trips for Diaspora representatives, and disseminate information on relevant issues regularly by means of publications.
- 3. The lobby should open avenues of dialogue between the Diaspora leadership and Israel's political leadership whenever disagreement and tension in Israel-Diaspora relations arise.
- 4. The lobby should act to enhance awareness in Israel of social, economic, and informational issues of shared concern to Diaspora Jewry and Israeli society. When necessary, it should act, by dialoguing with Israeli public representatives, to promote specific legislative initiatives.
- 5. The lobby should do its best to enhance Israeli public awareness of the issues on the lobby's agenda, by means of the media in Israel and the Diaspora.

Proposed Stages in Establishing the Lobby

 A comprehensive, probing discussion should be held with a select group of Israelis on the basis of this position paper, with attempt made to arrive at an agreement and

formulate a joint position paper phrasing the lobby's principles, objectives, and modus operandi.

- 2. A similar discussion should be held with a select group of American Jews on the basis of a position paper adopted and formulated by the Israeli group. This document should, of course, be translated into English and presented to the Diaspora representatives for examination and comments. It should be noted that although the Diaspora part of the lobby will begin in North America, at a later stage the lobby will be opened up to the Jewish world in its entirety.
- 3. At the end of the discussion stage, a final, complete document agreeable to both sides should be phrased. This document should come out in Hebrew and English.
- 4. This document should come with a budget appendix spelling out the association's financial needs and recommending ways in which they may be met.
- The preparations for registering the lobby as a public nonprofit association should be made.
- 6. A managing committee in Israel and the Diaspora should be appointed, as should be a director-general agreeable to both sides.
- 7. The managing committee should convene for a preparatory working meeting with the following purposes:
 - Taking a defined financial commitment toward the activation of the lobby.
 - Determining the lobby's specific goals before it begins to operate.

- The first two years should be devoted to the coalescence of the Israeli side and its American partner.
- 9. After three years or so, a founding convention of the lobby should be held, in Israel, with the participation of 150 delegates from each side.
- 10. As stated, this is a first draft for discussion and fleshing out. Any comments, elucidation, and proposals will be appreciatively received.

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הסוכנות היהודית לארץ־ישראל The Jewish Agency for Israel המחלקה לעליה וקליטה Department of Immigration and Absorption

לשכת ראש המחלקה Office of the Head of the Department

March 18, 1993

AMERICAN JEWISH

Rabbi Herb Friedman Wexner Heritage Foundation 551 Madison Avenue New York, NY 10022 USA

Dear Rabbi Friedman,

I very much appreciate your lengthy and detailed letter of March 8th and I read it with great interest. While doing so I felt that you had read my paper very thoroughly and seriously and were responding at length to its contents. I absolutely understand and accept your criticism. I think it is not only legitimate but constructive.

Without getting into details I would like to clarify one point. I know that you, Herb, are a man of depth and I very much appreciate what you have accomplished with the Wexner Heritage Foundation. From my letter it could have been understood that I suggest another forum or group to deal with dialogue and discussions only (which by itself I don't think is a bad idea). But I agree with you that talk isn't action. Talk may be the prelude to action yet I, during my years of public work, have learned what real action is. I have proven it with the absorption of youth aliyah, establishment of the Nitzana village and, of course, during the last years bringing thousands or hundreds of thousands of immigrants from the former Soviet Union and Ethiopia and assisting them during their initial absorption in Israel.

My feeling is that there is much room for improvement in regard to Israeli/Diaspora relations. I will start, of course, at home. I have more than once wondered when the Israeli Government would hold serious discussions on the issues that disturbs us both. Unfortunately, it's not a central issue on the Israeli national agenda. I believe that if an Israel/Diaspora lobby, with clear and precise targets, will be established and it will also need budgetary expression, then we will be able to move forward and to make the necessary changes.

In your letter you have suggested three "positive actions". One of them is the building of a family village in Israel. I can see a very interesting link between my approach and your suggestion. If it would be possible to define an actionoriented lobby which on one hand would try to change the priorities and on the other hand enhance the creation of a family community as you suggested, then we could make the best of our different points of departure. If at any stage your idea becomes a reality I think I could be of assistance in such a venture.

I would very much like to continue the dialogue with you since I think it's very important and I thank you in advance for your patience and attention.

7.0.

Yours very truly,

Wi Gordon. -

Uri Gordon Head Department of Immigration and Absorption

P. S. I have read the two speeches that you enclosed with your letter. I absolutely agree with your statement that we have achieved the building of a State but not yet the creation of a nation - and we still have a lot ahead of us in this area.



DEAN, ZIEGLER SCHOOL OF RABBINIC STUDIES

VICE PRESIDENT, UNIVERSITY OF JUDAISM

July 21, 1998

Rabbi Herbert Friedman President Emeritus Wexner Heritage Foundation 551 Madison Ave. New York, NY 10022

Dear Herb,

Before Beth and I depart for Israel in just over a week, I wanted to write you to let you know how much I enjoyed our conversation and how deeply I was stimulated by the ideas we had an opportunity to share. It seems that every encounter I have with you leaves me thinking and churning with creativity. This past conference in Snowbird was no exception, and I thank you from the bottom of my heart for taking the time to chat.



Needless to say, I also left the conversation very energized by our discussion of ways we could begin to have an even more profound impact on Israeli culture and society. The genius of the "Wexner vision" desperately needs to be brought to Israel. I agree with you that issue here is not only to create a cadre of young and visionary leaders for the State, but indeed, to battle for Israel's soul.

I know that you will be discussing these ideas with Mr. Wexner when appropriate, and I very much look forward to hearing from you if you believe there is anything we ought to discuss.

Until then, I am taking the liberty of enclosing a card with ways in which I can be reached during my sabbatical. I look forward to hearing from you with regard to matters both professional and personal, and in the meantime, wish you and your family a *shanah tovah*, a year of challenge and fulfilment, health and peace.

All the best.

Shalon Daniel Gordis enc.

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Sunny and Isadore Familian Campus 15600 Mulholland Drive, Bel Air, California 90077-1599 (310) 476-9777 FAX (310) 476-7768 E-mail: dgordis@uj.edu

FINALE

 I. ACT NOW May 18, 1994 Logic & History to support proposal for new organization and new visions

E S

- II. FIRST DRAFT Including diagram ICAN JEWISH
- III. SECOND DRAFT Including diagram and list of recipients
- IV. THIRD DRAFT



ACT NOW

A proposal by Rabbi Herbert A. Friedman May 18, 1994

A PREVIOUS PERIOD OF INACTIVITY

THE 1930'S AND 1940'S

During this period there was bitter fighting over ideologies. The two major organizations disagreed as to objectives. The Joint Distribution Committee felt that emphasis should be placed on the rescue of and assistance to endangered populations of Jews, rather than on the development of Palestine which seemed to be a distant goal, ill-suited to an amelioration of the present dangerous situation.

The Zionist-oriented forces, campaigning under the banner of the United Palestine Appeal, resisted and resented the JDC approach, as being short-sighted and unaware of the tremendous yearning of East European Jewry for a place of its own where it could be at peace. Further, there was an underlying uneasiness between the two societies, due to the differences still prevailing between German and Russian-Polish immigrants. The JOC hash been Founded by the up town "German Jevs

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Copy sent T. h Schorts

The arguments over ideologies resulted in fiercely competitive fund-raising. 2isnist movement This situation prevailed over a number of years and existed not only on the national level but infected the local communities as well. Neither campaign did well. derived of Bereft of adequate funds, both goals languished and struggled along while the fate From the of millions of Jews overseas grew increasingly perilous. Finally the moment messes of arrived when it became obvious that the major fund-raising would have to be Russian conducted in a united fashion in order to mobilize American Jewry. The moment Polish was Kristallnacht, the night of November 8-9, 1938, when a massive attack raged throughout the entire country of Germany against synagogues and business establishments which came crashing down in a blizzard of broken glass. The Nazi goal became clearer. The two antagonistic organizations launched the first united campaign within eight weeks, following years of suspicion and separation.

Year	Goal	Raised
1939	\$20M	\$16.25M
1940	\$23M	less
1941	\$25M	\$38M

1942-1944	The JDC continued to receive more than	the
	UPA.	

- In 1942 The Zionists passed the Biltmore. Resolution, calling for the establishment of a Jewish State of Palestine. This caused tension in the fund-raising arena and a renewed sense of competition.
- In 1943 There was established the American Council for Judaism, a violently anti-Zionist pressure and propaganda group, largely supported by the Reform movement, which fought openly and hard against the idea of a State. This also affected the fund-raising climate.

In 1944 - The goal was \$32 million - amount raised was \$27 million.

Between 1939 - 1945, inclusive, a total of seven years of uneasy cooperation, interrupted by frequent fights and suspicions, a total of \$124 million was raised, for an average of 17.7 million per year.

American Jewry could not agree on the nature of the danger nor on the method to counter it. The only positive fact was that the UJA managed to hold together, because both sides compromised, but the campaign limped along.



ACTION DURING THE 50's - 90's

American and Diaspora Jewry simply decided, once the State of Israel was established, that this should be the priority. The campaign took on a focus, ideological quarreling ceased, and the upbuilding of the new country assumed center stage. Absorbing immigrants (rescue), security and the economy were the highlights. There were ups and downs in the yearly campaign totals, but slowly the momentum gathered strength; the wars developed a sense of maturity and realism; the thrill of creation provided additional stimuli, and the net result of a half-century of concentrated effort elevated the campaign from a \$60 million level to more than one billion.

This focus and concentration must continue at a high level for the balance of the decade, or so long as the migration from the ex-Soviet Union maintains itself at the 50 - 70,000 annual level.

MEANWHILE, WE MUST PREPARE FOR THE NEXT HISTORIC PERIOD

Everyone in the leadership ranks is fully aware of the terrible danger regarding the future survivability of the organized Jewish community. The term "CONTINUITY" has, in the short space of one year, become a dreadful cliche - so badly overused that most people are ashamed to use it. The word is hollow because there is no action flowing from it. Actually, from the time of the CJF General Assembly in November 1992, when the issue was first raised in a manner which brought it to the attention of the entire community with great impact, until today, there have been reams of speeches describing what must be done, and almost no concrete steps have been implemented.

Yes, there are continuity committees in every city and in every organization and in many synagogues, and there are small beginnings, but no action on a national level, and not even the slightest rumblings of a master plan or parts of a plan or anything resembling a galvanization of energy and will to address the matter on the proper scale. There is an awareness that the drift toward indifference and dissolution can be ameliorated, slowed down, perhaps even reversed by certain

programs, such as a rejuvenated Hillel on the college campuses, a massive number of teen-agers being exposed to an Israel Experience, and a network of superior day and boarding schools on the upper level. Faint beginnings have been made in all these areas. But what is needed - a major shock to awaken consciousness, to lead the way toward widespread action - is not being spoken of, let alone showing up on anyone's drawing board.

No - we are not paralyzed by ideological arguments as were our predecessors in the 30's and 40's. Happily there is no argument or disagreement as to the diagnosis or the prescription. There is simply continuous fumbling, with no one taking the lead.

We need one or more national personalities to mobilize a small group of caring people who will:

1. Form a new non-profit tax-deductible 501 c 3 corporation which will create and supervise master programs in six areas:

A) Israel-centered Experiences for youth, ages 10 - 25.

B) <u>Boarding Schools</u>, of high calibre, with Judaic-secular curricula, for grades 9 - 13.

C) <u>Hillel Foundations</u>, on college campuses, to encompass both undergraduates and graduate students, ages 18 - 22, and 22 - 28.

D) Summer Camps in U.S.

E) Sabbatical Year in Israel, for adults.

F) Family Life Seminars, for adults.



2. Select a name for the Corporation which will encapsulate its objective. Below are some examples:

> THE CORPORATION FOR THE FUTURE AFFIRMING OUR FUTURE IN AMERICA OUR IMPERISHABLE HERITAGE A BOLD GRASP ON THE FUTURE A DIASPORA DETERMINED TO THRIVE

3. Development, each of the six programs in detail, beginning with a statement of purpose, then proceeding to the management structure, physical needs, operating plans, marketing plans, staff, outside experts and finances. There must be a clear definition of goals, in specific numbers and objectives, with targets and timetables.

ARCHIVE

4. Engage in discussions of these master programs with the National Organizations (UJA, CJF, Synagogue bodies, etc.) and with the Local Federations (through regional meetings) to reach all the key lay leaders and executive directors, in order to create a strong national will to succeed.

As a result of these consultations, a plan will emerge in which responsibility will be accepted by one or another of the participants for various parts of the various programs. Ultimate responsibility will lay with the Corporation, which is the engine driving the master plan.

5. The structure of the Corporation shall consist of one or two Chairs; a Board of seven to nine members; a President (CEO) and several officers; and a central office.

ACTION REQUIRED IMMEDIATELY

A. Select the proper person(s) as Chair (and co-Chair), who shall then agree upon and appoint the first five Board members, to start with.

B. That group shall select a (temporary or permanent) President, set up an office and procure the necessary start-up funds for the first year of operation.

C. The President and his first small number of officers shall draw up the mission statements and other items described in 3 above.

D. The Board shall be expanded to its full strength, in order to discuss, amend and ratify the master plan for each of the six areas of work as described in 1 above.

E. The process described in 4 above can then take place, over a period of months.

F. At its end, a major National Conference shall be convened by the Board to announce the block-buster National Continuity Program. Revealed will be the full scope of the major educational and financial goals, together with the first contributions garnered quietly during the year of planning time; the full panoply of national and local officers; the support of the major Organizations; the support and presence of the major Israeli personalities; and all this accompanied by a strong public-relations effort, designed to continue for the first few years.

I believe that the American Jewish community can be aroused to respond to the challenge of working hard to sustain its own viability; and I believe that the programs outlined above, plus others to be conceived, can stem the present drift toward weakness and dissolution.

The goal is certainly worth the effort.

HISTORY and Logic both support the proposal to create new organization (s) with up-to-dute visions and greals.

FIRST DRAFT OF NEW ORGANIZATION INCLUDING DIAGRAM

ARCHIVES







<u>Mega – Program to be built by Mega – Dollars</u> Notes by Herbert Friedman for Discussion with Wayne Feinstein

1. Negative prognosis re: future of American Jewry

Fewer then one million self – identifying Jews by third quarter of 21^{st} century. Of these, approximately $\frac{1}{2}$ will be orthodox, living inside their enclaves, and $\frac{1}{2}$ try to hold on to a crumbling infrastructure. Such a fate musts be averted, if at all possible.

2. Strongest efforts must be made to create and shape Jewish identity in the next two generations. Through spreading knowledge of our heritage, pride in its contribution to civilization, and linkage with Israel.

- 3. List of major areas (call them projects) on which to work:
 - a. Elementary schools hundreds
 - b. Summer camps scores
 - c. Secondary schools scores
 - d. College age Hillel hundreds
 - e. Israel Experience all ages hundreds of thousands
 - f. Higher education in Israel thousands
 - g. Teacher's training college three
 - h. Adult education ala Wexner hundreds
 - i. Synagogue innovative programs thousands
 - j. Russian immigrants half million

4. All programs must be continental in scope, totally communally funded, no tuition to be charged for anything, thousands of lay leaders involved in management via small groups, with executive staff to be recruited from wide professional base.

5. Many billions will be required. No fund – raising necessary. Funding to be secured from total communal assets in endowment and similar funds. Annual campaigns not to be touched to support work in above list.

6. New national organization needed to supervise this mega – program. UJA and CJF deal with annual campaign, as at present.

7. Suggestions:

Members of Mega-group would be mobilized as CEOs

- a. One over-all chairman of international stature and one deputy.
- b. One CEO for finance (manage the money flow from the source to each project); (increase available money by leveraging through borrowing and/or floating bond issue).
- c. One CEO for each project.



 d. One CEO for liaison with Israel (not all projects will require Israel).

8. This top structure requires a total of 14 persons. That's it. No enlargements. This is the policy – making body. Each of the CEO's in b., c., and d. may create their own deputy and small executive group.

9. One name* must be invented for the over-all effort. Individual project names must reflect its area of work.

- 10. Headquarters can be anywhere in the United States.
- 11. Entire effort must be imbued with urgent sense of timing. Every project must work with a timetable i.e. so many schools in so many months etc.
- * THE BOOTSTRAP CENTURY FUND THE KNOWLEDGE FUND THE EVERY-PERSON PROGRAM TO-INSPIRE-ME IN TIME

SAN FRANCISCO, THE PENINSULA, MARIN AND SONOMA COUNTIES

Jewish Community

CIFFICERS President Alan F. Kuthanleut;

Bacquive Vice Pessidens Wayne L. Feinstein Vice Presidents

Adele Carvin Sustan Fulkenza John D. Galdiman Robert M. Levison Jr. Alvin T. Levist

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CONSTITUENT AGENCIES Bureau of Jewish Jaducanon Hebrew brei Laun Americanon Jewish hamily and Children's Services Jewish Home for dur Aged Jewish Home for dur Aged Jewish Home and Nonsing Heme Manar Zon Health Systems brennd Other Marin JCC CC - San Francisco Penarola JCC Camp Tawongs



MEMBERS OF UNITED WAY OF THE BAY AREA JUL-29-1997 12:50

FAX: (212) 751-3739

July 28, 1997

Rabbi Herb Friedman Wexner Heritage Foundation 551 Madison Avenue, 9th Floor New York, NY 10022

Dear Herb,

It was wonderful spending time with you during the Wexner Institute in Jerusalem. Enclosed is my draft of a "white paper" on the topic of mobilizing resources for the things that are important to us.

I take no pride of authorship, and in fact have obviously drawn from our conversation in your own initial thoughts. I would appreciate your critical reaction. While I will be on vacation the latter part of August, if it is possible for you to give me your edits in the next week or so, I would then share this as a "think piece" with a few colleagues whom I would then see in New York in September during the forthcoming CJF meetings. I would like to get the ball rolling...

All the best!

Sincerely,

Wayne Feinstein

WF:lp

Enclosure

121 Stouart Street San Francisco, CA 94105 415/777-0411 FAX: 415/495-6635 411 Burel Are. #503 Son Mateo, CA 94602 415/349-1523 FAX: 415/572-0949 4154956635 655 Arastrudero Rd. Palo Alto, CA 94306 415/494-8444 FAX: 415/494-8465 99% 200 No. San Pedro Rd. San Rafael, CA 94903 415/499-1223 FAX: 415 499-0308 P. Ø1

FOR DISCUSSION

7/25/97

TOWARD A NATIONAL FUNDING PROGRAM TO INSURE JEWISH COMMUNAL VITALITY IN THE 21ST CENTURY

WAYNE FEINSTEIN

SITUATIONAL ANALYSIS

One can reasonably make the case, based on current socio-demographic evidence, that the number of identifying/affirming Jews in the United States will diminish appreciably by the middle of the next Century. Left unchallenged, in two generations there may be as few as one million affirming Jews in America. Of those, half will be orthodox living in their self-contained enclaves. The other half will be struggling to maintain a crumbling infrastructure that we have build or are presently rebuilding. We have the opportunity and the responsibility to use resources now existing in Jewish federations to creatively invest in programs and agencies that will reverse these negative sociodemographic trends.

GOALS/STRATEGIES

Knowledge of Judaism, its history, traditions, and literature, is our surest means of insuring a vital American Jewish future, with greater numbers identifying/affirming their place in Jewish history. The vitality of our heritage, pride in the contribution of Judaism to the advance of civilizations, and the dynamism of Israel and our linkage by fate and faith with the people of Israel must be effectively taught wherever Jews live.

MAJOR PROJECTS

- · The following are the key areas for continental collective efforts:
- Hundreds of additional elementary day schools;
- Scores of additional Jewish camps;
- Scores of Jewish high schools of the highest academic quality;
- Expansion of Hillel programs throughout the country;
- Hundreds of thousands of Israel experience scholarships;
- Thousands of scholarships for higher education in Israel;
- Building top quality Jewish teacher training institutions;
- Hundreds of new adult Jewish education programs (developed on the Wexner Heritage model);
- Support for thousands of innovative synagogue programs;
- Focus on the Jewish education of the hundreds of thousands of Russian emigres.

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P.02

CONTINENTAL, COLLECTIVE RESPONSIBILITY

CALLS OF REAL OF CONSISTER TEPS

In the emerging era, when the tasks of rescue and relocation are largely complete, the focus of our leading Jewish communal enterprise must shift to the quality of Jewish life in America. In times of external threat, we've mobilized effectively to respond. The current challenge is internal, but we can and must mobilize with equal vigor to invest in the positive means of insuring Jewish vitality.

Billions of dollars will be required to meet the challenges listed. Yet, in Federation endowments and private Jewish foundations, billions of dollars are banked and potentially available for communal use. The individual donors and trustees must be invited to invest in this national Jewish project. A reservation can be sought for a share of the continental goal from Jewish foundations, philanthropic funds and support foundations. Together, these commitments would amount to the billions needed, for capital and programs resources in each category. It's possible that some donors will prefer one or another of the project areas, and that can readily be accommodated—taken together, the funds would be mobilized for this national effort, while permitting a high level of donor targeting to preferred fields of service.

OPERATING SUGGESTIONS

- · Top lay leader, with "international" stature, must be recruited to lead
- Urgency of this as a national Jewish project must be established; timetables and goals in each project arena must be established to convey seriousness and accountability
- CJF/UJA would be responsible for the fundraising effort
- A new national organization, closely linked to CJF/UJA and the federations would be the overall implementing body (this might be a national supporting foundation to hold and ensure the proper use of donor/community contributed dollars)
- Lay chairs with national stature would be recruited for each project area
- Chief executives, with excellence in the appropriate field, would be mobilized to direct the national effort (including the development/implementation of standards and policies, structures and forms) in each project area
- The board of the national organization would consist of the chairs and executives of each project area[i.e., a small, apolitical, effective governing board]...though within each area, ample opportunity for larger advisory committee that would naturally draw from interested donors would be developed
- Headquarters could be located anywhere in America
- Every local project, once stimulated, will provide ample opportunity for lay leadership involvement, insuring ample investment in the proper development of the new local agency or program, the necessary tie to the community, and the ability to draw additional resources on an on-going, operating basis

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P.03

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

Dear Wayne:

August 8, 1997

You asked for my "critical reaction" to your memorandum, which I have read through several times.

Basically, you have presented the case very well in the first three sections - Analysis;

Goals/Strategies; and Major Projects.

The section on <u>Continental Collective Responsibility</u> reads beautifully in the title, but there are a few points I would add, in order to sharpen the focus.

- 1. Stress the fact that this crusade must be handled on a national basis, with input from the local community and national organizations. For example take Hillel: The national organization of Hillel in Washington must give a prioritized list of where additional staff must be added or new Hillel houses must be built and what the capital cost would be. Or take the Israel Experience: The local Federations must make a census of how many 15-year-old kids they have, and a national total would determine how much money must be raised for that project. The necessary amount would then be turned back to each community to finance the number of kids they have.
- Stress the fact that <u>all costs</u> must be financed from the global total raised. All tuitions should be free - schools, camps, higher education, Israel Experience, etc. At best, a token fee (\$100 per student) from the family.

The section on **Operating Suggestions** is not quite clear in points 3 and 4.

Point 3 says CJF/UJA would be responsible for fundraising. Point 4 refers to a "new national organization".



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I had in mind that the new organizations would raise the billions and allocate them. The CJF/UJA should remain responsible to raise the regular annual operating campaign. The two efforts should not be mingled. They are different in purpose and scale.

The annual campaign has to support all the local agencies, plus the JDC and Jewish agency. That is what I think of as the maintenance campaign.

The new organization has to stretch out to release the billions now sitting in the various endowment and foundation funds - plus look for additional billions. That is, in effect, a capital campaign.

I don't think the CJF/UJA can handle both jobs. They should do what they know how to do.

A new organization means just that - NEW - with new methods, new lay personnel, new staff. And they have to be imbued with the notion that they are conducting a <u>Rescue Operation</u> for <u>American Jewry</u>. That's why I used the word "crusade" earlier.

Good luck in your conversations with colleagues.

Keep me posted.

Herb.

AMSECOND DRAFT

T.
-Confidential Draft -

Not for Distribution or Sharing

FROM:HAFTO:Les Wexner & David EdellSUBJECT:Goals and Governance: Basic IdeasDATE:14 August, 1998

1. National Organization Switches

When polio doesn't exist anymore, March of Dimes switches to Multiple Sclerosis.

2. <u>UJA/CJF Take Note of Above</u>

As awareness of, and attention to the Holocaust diminishes, and as the miracle of Israel reborn is taken for granted, old-fashioned campaigning on these themes is left without glamour or excitement. So...UJA/CJF must shift gears.

3. Switch to Strengthening U.S. Jewish Community (in which

Israel can play as big role as Israeli Government now understands) (See #8 below). Create several nation-wide operating foundations (to receive funds which are then allocated back to the local communities for implementation)

- a.) Day Schools, from elementary to high, with token tuition.
- b.) Learning Hebrew (for synagogue and holiday observance), plus spoken.
- c.) Hillel Major infusion of staff (rabbis and others) for creative programming.
- d.) Birthright, for ages 15-25, at token or no cost to the students.
- e.) Camping in both the U.S. and Israel hundreds of camps, at very low cost to campers.
- Improving ethical standards and concentration on social justice to shape a better society in the U.S.



4. <u>Restructure the Responsibility</u>

Assign high-powered lay chairperson, plus top executive, and staff assistance to each foundation, with its own operating budget. (See attached list of suggestions # 12.

- 5. <u>UJA/CJF Create Operating Foundations</u> for each specific project. All projects in Israel to be managed directly by UJA/CJF. No need for an "agent" to do the work. Copy JDC style which is perfect. They do their work with direct employees or contractors.
- <u>Do Nor Renew</u> usual contract with Jewish Agency and JDC. Instead, phase J.A. (And UIA) out, over four years by reducing their allocation at the rate of 50 million per year. Obtain approval of Finance Minister and Agency Chairman in advance. Make normal annual allocation to JDC (approx. 60 m).
- <u>Convene a National Congress</u> to make quick decision on this new plan. Glacial process of the past to be replaced by deadlines.
- 8. Rabin's approval

On October 21, 1995, two weeks before his assassination, I met with him and his closest aide, Eitan Haber, in the Regency Hotel, N.Y., to discuss an idea. The UJA was delivering about 200m to the J.A. I suggested holding back 50m and using it for Israel Experience. He asked for assurances that the money would not be diverted, and I answered to his satisfaction. He shrugged and agreed. I warned him that if we learned how to spend it properly and send thousands of kids, I would ask to withhold 100m next year, He understood and said that the government could absorb the loss from the UJA, and the UJA could do Israel a greater good by creating links between Israel and the younger American-Jewish generation.

- Publicize the New "Switch" widely in both U.S. and Israel. "Rescue Our Own Kids for Judaism and Israel."
- 10. Money

The annual campaign could generate renewed enthusiasm and understanding, with stronger marketing. A huge influx of cash could be available by using the endowment funds of all communities (5+ billion and increasing rapidly every year) as collateral for borrowing. Banks have plenty of money. UJA credit rating is high. The annual campaign could handle interest plus debt reduction payments, on a revolving basis.



11. Structure of UJA/CJF



12. Examples of Lay Leaders and Executives in Charge of National Projects

Project	Leader	Executive
Fund-Raising	Carole Solomon	Bernie Moscovitz and/or?
Day Schools (elem) and Birthright	Michael Steinhardt	Yitz Greenberg
Day Schools (high)	Charles Schusterman	Joseph Reimer & Ted Sizer
Summer Camps (U.S.)	Rob & Elisa Bildner	Ramie Arian
Hillel	Edgar Bronfman	Richard Joel
Israel Experience age 12 – Summer Camps age 15 – Field Trips age 22 – Graduate Study	Charles Bronfman	Jeff Solomon
Adult Education	Mort Mandel	Nathan Laufer
Hebrew Ulpanim	?	?

11

FUTURE PROJECTS

- 1. Any emergency situation in Israel, or anywhere in the world quick mobilization of all lay leaders and executives
- Build infrastructure and lay leadership for Russia and FSU communities make links with JDC, Lubavitch, World Union for Progressive Judaism, and Russian Jewish Congress.

AMERICAN JEWISH A R C H I V E S



PERSONS TO WHOM DRAFT WAS SENT:

AMERICAN JEWISH A R C H I V E S

Jeff Solomon Bernie Moskowitz Bruce Soll David Edell Michael Steinhardt Richard Wexler Marvin Lender Les Wexner



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THE WEXNER DATE: 8/ 19/ 98 **TERITAGE FOUNDATION** TO: Bernie Moscovitz FAX #: 284-6820 Number of Pages (including cover sheet):____ 5 Herd Friedman FROM: Message: Dear Bernie - I was enheartened immensely by your positive reaction. Thanks for your understanding. The made a few changes in paragraph 3, for clarity seke. Hert



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DATE: 8/19/98



551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

TO: BRICE SOLL FAX #: 614 - 415 - 7240 5 Number of Pages (including cover sheet):_ FROM: Herb Friedman Message: Dear Bruce - I have made a few changes in paragraph 3. In clarity sake. I have not sent a copy directly to Les. Should I a not ? Hert



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DATE: 1/19/98 DAVID EDELL TO: 983-1687 FAX #: Number of Pages (including cover sheet):____ 5 Friedman Herb FROM: Message: Bernie Mascovitz accepted my concept of a new model innediately with enthusiasm. Michael Steinhardt and Brure have received copies - no one alse. Bruce is advising me whether to send one to Les. Call me. Hel

551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

THE WEXNER

****	*****	-COMM. JOURN	AL- **********	V DATE AUG-1	.9-1998 ***	** TIME 11:44 *** P.01
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TO: MICHAEL STEIN HAROT

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DATE: 8/19/98

FAX TRANSMITTAL

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551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

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FROM:	Herb	Firedman			
		Michael,		is a	Kotally
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FAX TRANSMITTAL



551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax

DATE: AUG 27, 1998 TO: Richard Wexter FAX #: 312-443-0336 Number of Pages (including cover sheet): erbert A. Friedma FROM: Message:

- ****

21 751 3739- *******

The Wexner Heritage Foundation

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

DATE:	August 27, 1998
FROM:	Herbert A. Friedman
TO:	Richard Wexler
VIA FAX:	312-443-0336

Dear Richard -

Attached are draft notes for a completely new model. These notes do not spell out details. Once you read them, we should have a longish conversation (¹/₂ hour minimally) in person or by phone. The other persons who have seen these notes are: Les Wexner, David Edell, Bruce Soll, Bernie Moscovitz, Michael Steinhardt and Jeff Solomon. And I don't intend to send them to anyone else.

Best regards, Herb





****	***** -	-COMM. JOURNAL-	- ********	K# DATE	E SEP-28	3-1998 ****	* TIME 15:53 ***	P.01
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FAX TRANSMITTAL

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21 751 3739- *******



DATE: 9.24.98 TO: Marvin Lende FAX #: 203-397-8506 Number of Pages (including cover sheet): Leib Friedman FROM:

551 Madison Avenue New York, NY 10022 (212) 355-6115 (212) 751-3739 Fax Message:

The Wexner Heritage Foundation

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739



AMERICAN JEWISH

DATE: September 28, 1998 TO: Marvin Lender VIA FAX: 203-397-8506

10, 7

Dear Marvin,

Attached are draft notes for a completely new model. These notes do not spell out details. They are the basis for a deep and searching discussion.

Herb





The Wexner Heritage Foundation

551 Madison Avenue New York, New York 10022 212 355 6115 Fax 212 751 3739

August 24, 1998

Dear Les, MERICAN JEWISH

I wrote this memo for two reasons,

- Absence of any sense of goal, direction or strategy on the part of the present leadership of UJA/CJF.
- Presence of a concept in my mind for a complete shifting of gears - a totally different model for doing our communal business.

I would really love to meet with you for an hour to flesh out the whole idea.

Best regards to Abigail, young Sarah and the rest of the gang.

Her







NOTES

9/3/98 Phone Call with Bruce

Points

- 1. I don't think Les should hold the meeting. But if he is willing to meet the group out of pure politeness, I have no opinion on that. Politeness is good.
- I must explain my thoughts to him. I sent my memo, after you said I should do so

 but it needs a good talking out. I need one hour.
- 3. After that I'll relax. Either he'll buy my analysis or he won't. At least I will know that I had a try.
- Jeff Solomon agrees with me. He uses words like transformation and reinvention.

A new UJA has to be born – and Les is the sperm and egg. He's the only one all the others will follow.

Bruce says: Talk to Jeff Solomon as the executive.

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I'm the visionary but not the person to make it happen.

10/13/01

Bruce says:

Long conversation with Jeff Solomon – urged him to give one hearing before group to advocate my new plan.

If he doesn't want to then I relax and forget it.

If he does, and they reject, also I relax.





TO REPAIR

Choose one of two routes (or both)

- Present UJC structure to run annual campaign, providing support to community Federations – funds to be used in local community for local needs – no allocations to overseas needs. Failure of UJC is due to absence of goal, vision, and purpose. This approach gives UJC a clear raison d'etre.
- New Structure (called UJA?) (or The Century Fund) be established to fund a specific set of major national and international needs. One set of these needs will feed back into local communities where necessary – for example, support for Birthright, lowering tuition in day schools, Hillel, etc.
- NOTE: See my original notes July 21, 1997 for Wayne Feinstein, his very positive acceptance, and my further elaboration.

THE CENTURY FUND

Day Schools for Both Israel and U.S.----scores Grades k-8

Day High Schools -----scores Grades 9-12

Summer Camps-----hundreds

Hillel-----hundreds

Birthright-----scores of thousands

Teacher's Training College-----start with five

Adult Education Program-----(ala Wexner) hundreds

Jewish Education for Russian Immigrants-----hundreds

Hebrew Language-----scores

Tor,

THE CENTURY FUND



<u>Israel – U.S. Understanding</u> a. Teach Israel in U.S. day schools – Hebrew language, birth (wars); growth; high-tech; social; religious clash; future HAIM SHAKED b. Teach U.S. in Israeli schools – religious pluralism; feminism; social welfare; constitution; English

RICHARD HIRSCH

Immigration Crises - Ethiopia, Argentina, Russia

Jewish Infrastructure in F.S.U. - schools, community centers, synagogues, etc.

Military Crisis

EHUD BARAK

10

Wexner Heritage Foundation – teach Judaism to elite military, business and government leaders.

DANIEL GORDIS, ALLON GAL – B.G.U., DAVID HARTMAN, AVI RAVITSKY

Israel Executive Group - 2 Project Chairs - 8

Total:

Choose Ten Best Executives to work with as a Board of Specialists



City	Executive
*New York	John Ruskay
*Chicago	Steve Nasitiv
Los Angeles	John Fishel
*Boston	Barry Schrage
*Detroit	Bob Aronson
Philadelphia	Howard Charish ?
Pittsburgh	Howard Reiger
*San Francisco	Wayne Feinstein
Denver	Steve Gelfand
*Miami	Jack Solomon
*Washington	Ted Farber – out in-(Russian)
*Baltimore	Darrell Friedman
Minneapolis	Herman Markowitz
Metro West, N.J.	Murray Lawlicht ?
*Cleveland	Steve Hoffman
Houston	Marvin Woskow
Milwaukee	Stephen Chernof
*Atlanta	David Sarnet - where is he?







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Note A

Theoretical, yet practical, guideline figures in an effort to block out a starting point. Some of these monies would be spent over multi-years (e.g. for schools); others would be annual figures (e.g. Birthright)

Day Schools K-8	20 @ 30 m. each	600 m.
Day High Sch 9-12	<u>ools</u> 20 @ 50 m. each	1,000 m.
Student Aid -	in order to lower tuition	2,000 m.N JEWISH
Summer Cam	<u>ps</u> – (get numbers from Rami	ϿΗΙΥΕϚ
<u>Hillel</u> – (get n	umbers from Richard Joel)	
Birthright 20,000 kids an	nnually @ \$2,000 each	400 m.
	TOTAL:	4 billion +
		2757 11

4/5/00 Notes Prepared by: Herbert A. Friedman

A SPECIAL FOUR BILLION DOLLAR CAPITAL CAMPAIGN FOR JEWISH RENAISSANCE & RENEWAL

(Obviously a short marketing name is required) CHAIRMAN – LESLIE WEXNER

 Precedent - Operation Exodus 1990-1995, for the absorption of Russian Jews into Israel and the U.S., succeeded in raising an extra \$1 billion, without any loss to the annual campaigns of those 5 years.

2. Present Needs -

- a. To help make Israelis more Jewish. Ditto for American Jews.
- b. To close the growing gap between U.S. Jews and Israel.
- 3. The Method -

A full-scale expansion of Jewish high schools in the U.S. At present there exist approximately a dozen such schools in the entire country, including those in operation and those in the planning stage.

4. Campaign Goals -

- a. Construction \$2 billion 20 schools in each country, average \$50 million each.
- b. Student Aid Fund \$2 billion in order to lower tuition to approximately \$1000 per year.

5. Sources -

- a. Individual donors, foundations, etc.
- b. From local Federation Endowment Funds, now totaling \$8.5 billion. In effect, this money comes back to the local community in the form of helping families to send their children at very low tuition.
- <u>Research</u> to select cities in both countries (U.S. and Israel) which would benefit from the existence of such a high school.

7. Personnel -

- Chairman of Capital Campaign Richard Wexler, who was chairman of successful Exodus Campaign.
- b. President Steve Nasatir (take leave of absence for two years).
- c. Chairman in Israel Avrum Berg
- Small Executive Committee (5-7 persons) let Wexler and Nasitir pick people they can work with.
- e. Larger body to meet semi-annually let "owners" pick.
- f. Campaign Force Wexner alumni in each city to assist with fundraising.
- 8. Note A, attached

