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Executive Committee. 1965.

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UNITED JEWISH APPEAL, INC.

MEMORANDUM

May 19, 1965

To: UJA Executive Committee
From: Herbert A. Friedman
Subject: Allocations in "Problem" Communities

At the Onchiota Retreat, June 5-7, 1964, the UJA Executive Committee reviewed the allocations problems arising in a number of communities from which UJA had received 45% of the gross, or less, in 1963. Of these, the following communities where the UJA's share was well below 45%, received close attention with the results indicated:

ATLANTIC CITY - UJA had previously received 37.6% of the regular campaign. The community agreed to raise this to 40% of the gross plus a Special Fund in 1965. There is also the understanding that every effort will be made to increase the percentage further during the coming years.

BRIDGEPORT - Our allocation and cash relationship with Bridgeport has been very poor. In 1963, for example, UJA's declared allotment came to 44.6% of gross but, as a result of the community practice of charging UJA's share with collection losses and the cross credits of pledges made in Bridgeport but paid elsewhere, we have thus far received only \$33,000 cash against the 1963 campaign. This represents only some 16% of gross. Prospects for additional cash are uncertain. By repeated protests and insistent pressure, we accomplished a change in community policy and were thus assured of a firm allotment of 39.3% in 1964 and a pre-campaign budget formula granting us 40% of gross for 1965. The leadership understands that UJA will be insisting on further substantial improvement in ensuing years.

DENVER - UJA's 1964 share of gross came to 39.7%. It was agreed that for 1965 this would be improved to 43% of the gross at the 1964 level of \$838,000. In addition, the leadership has resolved to attempt further progress in 1966.

DES MOINES - By unilateral community decision, UJA's 1964 allotment was fixed at 39% of gross. We registered strong protest and, as early as last summer, we informed the community that substantial upward revision would be required as the alternative to a separate UJA campaign. We requested that by January 1, 1965, the community develop a definitive proposal for our consideration. The local leadership undertook to do this. Despite our frequent inquiries and reluctant postponements of the deadline, we have not yet received any community proposal, the Des Moines 1965 campaign is under way, and the allocation issue remains unresolved.

LONG BEACH - In 1964 we received 42.4% of the gross campaign. The formula developed for 1965 assures us of 43% of the gross total raised.

OAKLAND - In 1963 and again in 1964 UJA's allotment from Oakland came to 42.3% of the gross total raised. For 1965 this relationship was essentially renewed up to the level of \$500,000, with UJA's share rising to 47% of gross coverage achieved beyond that.

PHOENIX - In 1963 and 1964 the Phoenix formula had UJA receiving 41% of the gross total raised. Our negotiations with the community developed a formula which would increase UJA's allotment in 1965 to 42% of the gross total raised on the first \$225,000 and 50% of any overage. However, the community recently indicated that the 1965 campaign expectation did not exceed \$212,000 and that this disappointment would cause local budgetary hardship if the UJA insisted on adherence to the formula. A top gifts resolicitation was contemplated provided UJA would consent to a 1.2% allocation drop on the first \$223,000 raised. This we were unwilling to do and we urged instead that the community mount an aggressive resolicitation in which the UJA would undertake to be helpful in every way possible, and that the formula be honored. The resolicitation is going forward, and it now appears that the campaign may achieve about \$280,000.

RICHMOND - In 1963 and 1964 the Richmond formula had UJA receiving 40.4% of the gross total raised. The formula developed for 1965 provides for deduction of earmarked gifts (as in the past) and 5% shrinkage and assures UJA 45% of the balance remaining. Applying this to the estimated campaign achievement for 1965, UJA's allotment will improve to over 41% of the gross.

SAN DIEGO - Our 1964 share of the San Diego gross total raised dropped to 38.8%. Negotiations with the community developed a formula which will assure UJA the proceeds of a separate Special Fund plus 40% of the gross regular total raised. The leadership has also informally undertaken to support UJA's request for 47% of the gross regular total raised in 1966.

TOLEDO - The community is aware of UJA's dissatisfaction with an allocation formula which, in 1963 and again in 1964, would have us receive only 37.6% of gross. In recognition of this, the community augmented our 1964 allotment to bring it up to the 39% level. The leadership understands that we withdrew our insistence on development of a better formula in 1965 based upon their assurance to us that the preponderant share of any increase experienced in the campaign would augment UJA's allotment, and that in addition they would make an earnest effort, at allocation time, to improve UJA's basic share of the campaign. Failing this, it was clear to them that we might have to consider seriously the possibility of a separate campaign in 1966.

TUCSON - In 1965 we were able to eliminate the particularly difficult problem which arose from the community practice of accepting substantial pledges to be paid in land. This year the community is accepting only pledges to be paid in cash, and UJA has a firm formula which will have us receive 42% of the gross total raised. This is a great improvement from our previous position which had us receiving only some 28% of the cash campaign and most of the pledges paid in presently unmarketable land.