



Jewish Federation
OF GREATER CHARLOTTE



ANNUAL SUMMARY 2021



Click here to view
the 2021
Annual Campaign Donors

Thank you

Federation is grateful to our donors, volunteers, leaders, professional team and community partners. On behalf of Federation and our beneficiary agencies, thank you for your commitment to strengthening Jewish life and making a difference in our local and global Jewish community.

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STRATEGIC OBJECTIVES



LETTER FROM LEADERSHIP

Dear Friends,

Thanks to your generous support, trust, and partnership, Federation continued to successfully execute its vital mission to support and enrich the lives of Jews locally, nationally, in Israel and worldwide, despite the challenges of the historic pandemic throughout 2021.

Honoring the resiliency of the generations preceding us, Federation adeptly pivoted to respond to the needs of the community resultant from COVID-19. We invested funds donated through the Jewish Charlotte Emergency Relief Fund to shore up local agencies financially during the crisis. We expanded our allocations process by establishing an Adaptation and Transformation Fund, channeling resources to local agencies enabling innovative changes to their service delivery models, ensuring the continuity of their missions.

In addition to funding more than 80 local and global agencies, Federation also responded, as it always has, to emerging challenges. We developed the structural foundation and funding to launch Outshine Hate, a multi-faceted, multi-year series of programming to combat the rising tide of antisemitism and anti-Israel sentiment and to build enduring connections with Israel. We also continued to fund, through the Adaptation and Transformation Fund, social justice initiatives launched in 2020.

Throughout our history, the Jewish people have adapted, survived, and prospered, despite enormous challenges. Federation is proud to partner with you as we endeavor to do our part, together, to build the future we want for the generations that succeed us. Thank you for your investment in your community through Federation.



Ronald P. Townsend

RONALD P. TOWNSEND
PRESIDENT



Susan J. Worrel

SUSAN J. WORREL
CHIEF EXECUTIVE OFFICER

MISSION

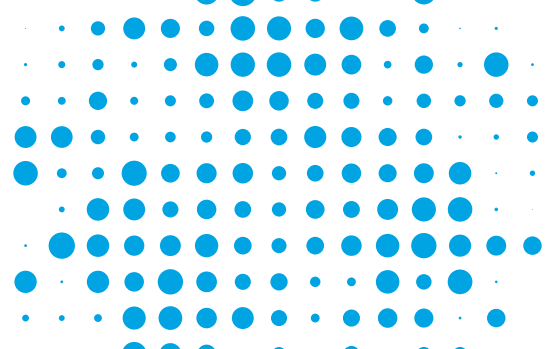
The mission of the Jewish Federation of Greater Charlotte is to raise and distribute funds to support and enrich the lives of Jews locally, nationally, in Israel and worldwide. Through education and community building, the Federation's mission ensures that Jewish values, goals, traditions and connections are preserved for current and future generations.





TOTAL ALLOCATIONS

\$4,746,845 *total allocations*



MANAGEMENT
\$257,379 5.4%

CAMPAIGN
\$569,063 12.0%

MARKETING
\$119,937 2.5%

80.1% BACK TO THE COMMUNITY

19.9% OPERATIONS

13% ADAPTATION AND TRANSFORMATION FUND
\$59,500

14.2% COMMUNITY PROGRAMS
\$673,010
Sponsored by Federation's JCRC, Jewish Engagement, and Center for Jewish Education

39.8%

LOCAL BENEFICIARY AGENCIES
\$1,888,783

24.8%

OVERSEAS
\$1,179,173



HOW WE GIVE

Federation works with our local and overseas Jewish agencies to identify and address the most pressing issues in our community. Together, we are changing and saving the lives of those who need our help most — locally and globally.

[Click Here to view 2021 allocations.](#)



FINANCIAL OVERVIEW

Statement of Financial Position

YEAR ENDING DECEMBER 31, 2021, PENDING AUDIT: C. DEWITT FOARD & CO.



Assets

Cash & Cash Equivalents	\$4,005,810
Pledges Receivable, Net	825,829
Other Receivable, Net	26,054
Prepaid Expenses	51,287
Endowments	3,337,817
Fixed Assets, Net of Depreciation	5,573

\$8,252,370

TOTAL ASSETS



Liabilities & Net Assets

LIABILITIES	
Accounts Payable & Accrued Liabilities	\$453,948
NET ASSETS:	
Without Donor Restrictions:	
Undesignated	3,782,528
Designated	2,159,666
Total Net Assets Without Donor Restrictions	5,942,194
With Donor Restrictions:	1,856,228
Total Net Assets	\$7,798,422

\$8,252,370

TOTAL LIABILITIES & NET ASSETS



LEADERSHIP & STAFF

EXECUTIVE COMMITTEE

- RON TOWNSEND**
President
- RISA MILLER**
First Vice President
- SARA KULBERSH**
VP of Financial Resource Development
- LINDSAY MUNS**
VP of Planning and Allocations
- SHARYN HANDELSMAN**
Treasurer
- JULIE SHEFFER**
Secretary
- ALISON LERNER**
Immediate Past President
- SUSAN J. WORREL**
Chief Executive Officer (Ex-officio)

BOARD MEMBERS

- MICHAEL BAUMSTEIN**
- JILL DINERMAN**
- JONATHAN FRIEDMAN**
- SLADE GOLDSTEIN**
- JAKE HOUSE**
- MARK ROTH**
- ZACK SCHWARTZ**
- IRA SLOMKA**
- LISA STRAUSE LEVINSON**
- AMY VITNER**
- JAN WEINER**
- BONNIE WILSON**
Presidential Appointee
- HOLLY LEVINSON**
- CONSTITUENT AGENCY DESIGNEES**
- BARRY BOBROW**
Foundation of Shalom Park
- JONATHAN KULBERSH**
Levine Jewish Community Center
- LOUIS SINKOE**
Jewish Family Services

CENTER FOR JEWISH EDUCATION

- DEBBY BLOCK**
Program Coordinator
- LISA GARFINKLE**
Operations and Projects Manager
- SUE LITTAUER**
Book Club Coordinator
- Library Services Associates
- SUSAN ABROMS**
- JODI COHEN**
- MARCI GOLDBERG**
- CAROL LAWRENCE**
Librarians:
- PAULA BROWN**
- JEAN MOATS**

- CHERI TITLEBAUM**
Library Collection Development and School Librarian

FEDERATION STAFF

- SUSAN J. WORREL**
Chief Executive Officer
- SAM BERNSTEIN**
Chief Development & Marketing Officer
- TAIR GIUDICE**
Chief Impact Officer
- CHERI MARTIN**
Chief Financial & Administrative Officer
- SUSAN STAFFORD**
Campaign Assistant
- DYLAN VANDER VELDE**
Director of Marketing

CHARLOTTE JEWISH NEWS

- SHIRA FIRESTONE**
Editor



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