Jewish Federation and Foundation of Rockland County

April 27, 2026 Minutes

1. Meeting begins 6:40
2. Minutes from February meeting approved,
3. Jason Shames and Robin Rochlin from Jewish Federation of Northern New Jersey make Presentation on endowment services. Review of funds under management, performance, compliance, white label treatment for Rockland endowments, capacity to meet needs for endowment funds and legacy giving, made pitch to also establish Donor Advised Funds (not currently contemplated) Working with Life and Legacy and applying to same cohort as Rockland is. Discussion on details of oversight, investment decisions, accessibility for participating Rockland donors. Marcy thanked for presentation.
4. Fundraising and campaign - Ari reported cash balance of $253,000. Income statement position of $634k campaign revenues vs $513 budgeted, corporate sponsorship lagging. Revenues of $813k vs budgeted $748k at the moment.
5. Campaign numbers are $620k unrestricted and $56k donor directed on 588 individual donations.
6. Draft arrangement with Chaverim has been completed along with CSI and Mithch Silber, and will be shared with Chaverim. Goal is to identify and jointly solicit a short list of Charedi donors supporting both of our work, split 50/50.
7. Life and Legacy 2.0 Agreement to re-enter program was discussed participation in the Life and Legacy program through the Harold Grinspoon Foundation, recognizing the commitment of resources, time and engagement with and through staffing and training involving several Jewish institutions in Rockland County.
8. Was Moved by Roberta Aaronson and seconded by Dustin Hausner passed 15-0 with 2 abstentions.
9. Events - In cooperation with Magen David Adom, we are at capacity for the Lior Raz event, May 3, 2026. 300 participants. We are responsible for security and venue cost, AFMDA is covering reception and speaker fee. Board appreciative of the initiative and looking forward to participating.
10. Good And Welfare
11. Meeting adjourned 8:22