

## JCP Update January 2020

### Leadership and Board Updates

- The board member portal is up and operational. You can log in now and view all board documents.
- Have you signed up to be an Ambassador? Our goal is for each board member to interact with one of our funded programs to express our appreciation for being a partner in meeting a community's needs as well as to learn more about the program.  
<https://www.surveymonkey.com/r/Z5TGCLH>
- On January 14<sup>th</sup>, JCP launched its four-part series of the Kay Usdan Saslawsky Institute for Ethical Leadership. It took place in Hyde Hall at Rhodes College and featured President Marjorie Hass, who spoke about the importance of “Rolling out the Red Carpet.” More than 40 leaders from Memphis Jewish community organizations signed up for the series. Rachel Shankman and Rabbi Abe Schachter-Gampel are facilitating the series.

### Operations/technology

- Basecamp is fully utilized by JCP staff for projects, policy, and anything requiring multiple people to accomplish a goal. It has made a big difference in workflow and productivity.
- Poll Everywhere has been utilized in the last two board meetings to capture opinions and ideas from board members. Poll Everywhere allows live interactive audience participation to brainstorm and prioritize suggestions.
- Live Lively is a platform for mobile giving. This platform is now live and can be used for giving. Mobile giving is a fundraising technique where donors have the opportunity to give to a campaign on any mobile device. Mobile giving comes in many different forms, like text fundraising, mobile donation pages, or mobile kiosks.
- JCP's new DipJar is making the rounds! It was present at the last board meeting and the Women's event.
- Staffing assignments have been shifted in order to support the data needs of JCP. Lauren Taube is the primary lead on the new CRM. She is getting data support from Gila.
- Moved email marketing from ConstantContact to MailChimp- 4,000 or so email contacts were moved. The new platform provides better analytic tools and other changes that aim to increase the percentage of recipients who see and open our communications. Early indicators show an increase from an average of about 25% to 40% open rate for recipients of the weekly JCPConnect newsletters, monthly Memphis Jewish Seniors newsletters, and various PJ Library, bereavement notices, and one-off communications for a variety of subjects. Research says that across all industries, the average open rate is 6%, while in non-profit, the average is better, at 25%.

### Jewish Federation & Campaign

- More than \$150,000 in new gifts and increases has been raised, which qualifies for the Plough Challenge. However, as in year's past, the Plough Challenge will continue to be used as a motivator at Super Sunday and in ongoing conversations with donors.

### Super Sunday:

- **29 NEW Donors = \$10,618**
  - **48 Donors Increased = \$2,676**
  - **143 gifts were closed**
  - **\$52,394 raised ... \$12,610 increase card for card from 2019 gifts**
  - **26 bakers (many of whom were not involved with Federation) donated to the bake sale!!**
  - **\$552 raised from the Bake Sale (our cost = \$0)**
  - **Engaged numerous families through PJ Library science experiments ... 15 Families dumped their tzedekah boxes into the tube!!**
- 
- New plaques have been added to JCP's Corporate Partnership Wall.
  - Campaign achievement projections will be made following Super Sunday.
  - BMW was so thrilled with the Women's Impact Luncheon that they requested another meeting to explore additional opportunities.
  - Twenty-three volunteer solicitors have signed up for Super Sunday and three non-phone volunteers.
  - The third of 5 Direct Mail letters were mailed in January to prior year donor's giving under \$500.
  - On Thursday, January 16, 2020, MJF held a women-only fundraising event to benefit Jewish needs locally and globally. Approximately 200 women attended. Suzi Weiss-Fischmann was inspiring and motivating. Each woman was asked to make a gift to the campaign. Results:
    1. Forty-seven women pledged at or because of the Women's Event: \$47,215.00. That's an increase of \$11,409 over the same donors' pledges last year.
    2. One hundred one attendees had already made their 2020 gifts.
    3. Twenty-seven women who attended are still open for 2020. 8 of them are new donors. The other 19 open donors are prior year donors of \$153,327.00

### JFS Endowment Fund

- Commitments of \$4,477,650.00 have been secured from 20+ donors with \$2,015,150.00 collected.
- The investment committee met to determine the best investment strategy and approved a 50% JCEP Endowment & 50% Vanguard VIAS Portfolio, which is in keeping with the strategy for other MJF endowment funds. \$250,00 will remain in a money market account, which may be utilized to support the 2020/21 operating budget.

### Jewish Foundation of Memphis

- Eleven new funds were opened in the last quarter in response to the annual incentive program. (Open a new fund and get \$1,000 to grant to your favorite Memphis partner agency)
- Four new B'nai Tzedek funds opened
- A new PAG Directory featuring 56 professional advisors is now on-line
- **Foundation 25<sup>th</sup> Anniversary**- We've branded a full year of celebratory programming with a suite of materials designed with a familiar look. This includes a unique 25<sup>th</sup> Anniversary mark for use across all pieces, the Professional Advisor Directory, Latkes & Vodka promotions, and event signage, and articles to use to market and decorate upcoming events and initiatives.
- 25<sup>th</sup>-anniversary festivities are being planned in cooperation with agency appointed board members.
- On August 25, 2020, a gala luncheon has been scheduled and will be held at Opera Memphis
- Total Deposits into Foundation funds In 2019 equaled: \$9,338,841.15
- In 2019, 3,048 grants were awarded to qualified charities totaling \$8,923,676.37 (669 different charities)

## Hillel

- Hillel has launched the "Jewish Learning Fellowship" (a new weekly class will be teaching) with 16 applicants! 6 from Rhodes, ten from U of M. The course starts next week!
- We are in the process of building a handicap ramp for the parking lot door to make the U of M building more accessible
- Jewish Community Fellowship partnership with Rhodes Admissions Office continues to be an essential effort. Ads were purchased in the Hillel College Guide and Southern Jewish Life magazine to encourage Jewish students to apply to Rhodes (and U of M). Also, Sophie participated in a webinar with the admissions office
- A new relationship with U of M department of Multicultural Affairs is taking shape intending to create a program partnership to provide further access to the university beyond the Religious Life space
- Student leadership – a new Rhodes Student Board was elected in December, and a new Student Leadership Council of U of M students will convene in the coming weeks
- Yiddish Cup is April 26th from 2-4! Registration materials are on the horizon. This year's theme is "My Hillel Story" to celebrate the role that Hillel has played on the leaders of the Memphis Jewish community. Individuals will be asked to share their Hillel Story to be used in marketing and publicity materials. Board members are encouraged to participate and to help others to do the same!
- Our Hillel Director, Sophie Bloch, has been accepted to participate in an exciting program - the Hartman Institute for Hillel Professionals, a year-long Israel education training.

## **Agency Marketing**

- **Impact/Grants Book**- A 48-page high-quality book carefully designed with short, impactful descriptions of grants made to partner organizations and what they have done/will do with the funding was created and mailed to all Jewish households.
- **Women's Impact Luncheon Marketing**- Designed to create FOMO (Fear Of Missing Out) to inspire ticket sales, our promotion of this event started early and hit heavy, driving ticket sales into the hundreds. Through print ads, lobby signage, digital blasts, and social media, this created a buzz that led to a huge crowd turning out for this event. Its high profile had a second effect on our audience, which we jokingly dubbed ROMO (Regret Over Missing Out)- after the event, photos shared online, comments and activity in social media, and general word of mouth has led to a much larger pool of women being eager to know what we plan for next year so they can be among the first to secure tickets.
- **Celebrating Big Wins**- Using print media like the Hebrew Watchman, and outlets we control like our quarterly print newsletter and jcpconnect.org, we share stories that show how we perform at the top level in Memphis philanthropy. Recent examples include our inclusion in Memphis Business Journal's *The List* publication which names Federation and Foundation among the top charitable organizations in the Mid-South; a recent Butler Snow Foundation's grant to support our *Dignity & Wellness for Vulnerable Seniors* project; and the Garfinkel Family's long term estate planning leading to millions of dollars being endowed to Jewish organizations in Memphis, including Memphis Jewish Federation.
- **Online Marketing using the human faces of JCP programming**- By consistently sharing the stories of our donors, beneficiaries, staff, and lay leaders, we humanize the organizations and their work, and connect real people that are known in the community to our work. Recent examples include Carol Buchman's recent trip to Shoham as an art ambassador and subsequent gallery exhibition at the MJCC; Teen Israel essays written by travel subsidy recipients upon their return to Memphis; our long-running 70 Faces of Memphis and Shoham project; Hillel Director Sophie Bloch's recent appointment to a prestigious fellowship.



***JCP Board of Directors Meeting  
January 8, 2020, 5:30 pm  
MINUTES***

On January 8, 2020, Jewish Community Partners and Memphis Jewish Federation held a Board Meeting to conduct its business.

At 5:31 pm, Mrs. Cindy Finestone, chair of the Memphis Jewish Federation Board of Directors, called the meeting to order.

**JCP Board of Trustees in attendance**

Cindy Finestone, Aviva Freiden, Hal Fogelman, Jonathan Frisch, Michael Greenberg, Charles Jalenak, Michelle Katz, Debbie Lazarov, Steve Libby, Alla Olswanger Lubin, Anthony Morrison, Scott Notowich, Eileen Posner, Jimmy Ringel, Jason Salomon, Jill Shanker, Dorit Shiloah-Boxer, Irvin Skopp, Andie Uiberall, Scott Vogel.

**Memphis Jewish Federation Board of Trustees in attendance**

Cindy Finestone, Michael Greenberg, Charles Jalenak, Scott Notowich, and Irvin Skopp.

**Jewish Community Partners Staff in Attendance**

Michael Barnett, Sophie Bloch, Abbey Cowens, Sheri Gadberry, Laura Linder, Lauren Taube, Matt Timberlake, Sarah VanderWalde, Tim Wheat, and Bluma Zuckerbrot-Finkelstein.

Cindy asked board members if there were any questions regarding the consent agenda that was emailed the week prior, and there were none. Cindy Finestone called for approval of the consent agenda. Andie Uiberall moved that the consent agenda be approved, and Jonathan Frisch seconded the motion.

**FRD Reports:**

Scott Vogel, VC FRD, thanked Abbey Cowens and Laura Linder for all their hard work on the campaign and reviewed the Annual Campaign dashboard as of January 8, 2020. The Campaign has met 95% of the Plough Challenge. Super Sunday is February 2<sup>nd</sup>. We currently have 31 volunteers signed up to help on Super Sunday.

Anthony Morrison, chair of the Jewish Foundation of Memphis, reviewed the Foundation dashboard as of December 31, 2019. Anthony reminded everyone how great the Latke & Vodka event was. There were approximately 150 attendees. This event kicked off the 25<sup>th</sup> Anniversary of the Foundation. The next step of the 25<sup>th</sup> Anniversary will be to focus of Agency participation. The Foundation is also sponsoring the Kay Usdan Saslawsky Innovative Leadership series. This series already has 41 people signed up and is beginning January 14<sup>th</sup>.

Laura Linder, CEO & President of JCP, reviewed the JFS Campaign progress. Laura recapped the Moss and Fogelman gifts. The Finance Committee and JCP Executive Committee agreed that no above and beyond funding would take place and that necessary funds would come from the JFS Endowment. The Campaign has 4.1 million committed from 18 donors. These commitments will be payable over 5 years.

## JCP Ambassador

Jason Salomon, was the first JCP Ambassador to visit his chosen agency and email JCP pictures. On December 18, Jason had the opportunity to represent the board as a JCP ambassador to the Bridge Institute/Universal Language Room (the "ULR") at Plough Towers. This is a community program funded in part with Fedovation dollars. The ULR is administered and is the brainchild of Jason Caplan. Jason Salomon was impressed by the URL and Jason Caplan.

## Community Impact

Jimmy Ringel made a motion concerning Synagogue Youth Group Funding criteria: In order to be eligible for Synagogue Youth Group funding, effective FY2020-2021, the following criteria must be met:

- The youth group must have a local, active teen board that plans programs;
- The programs planned by the teen board cannot be a part of regular synagogue programming;
- There is an affiliation with a national youth group.

Andie Uiberall questioned why a national organization affiliation is important. Mr. Ringel responded that the group felt that a national affiliation provides a complimentary experience that the teens need. Jimmy Ringel made the motion, and Dorit Boxer seconded the motion, the Synagogue Youth Group Funding criteria was approved.

Scott Notowich spoke about the upcoming event: Miles from Sarit. This is a unique partnership with the MJCC Fitness Center in memory of Sarit Sneor, a fallen soldier from Memphis' partner city in Israel - Shoham. We invite you to join our fitness challenge of obtaining 56 miles in workouts in 30 days! Her parents decided to honor her memory by establishing an annual 2-day relay race, called "Returning Home", in which Shoham High School seniors, right before their army service, run from Sarit's army base to Shoham, a distance of 56 miles.

## Discussion Topics:

- What should JCP be doing to address the staggering rise in hate crimes and anti-Semitic incidents?

Response	Net Votes
Community event inviting all synagogues, churches, mosques to an event celebrating Jewish life. We have many friends in the community that love us and would like to show us the love	8
Education of high school students	8
Strengthening ties with the non-Jewish community.	8
Create strong Community Relations Counsel	7
Coordinate a media campaign including television and radio ads	5
Have representatives speak at churches, church groups about the issue to make them more aware.	4
Column in CA and Daily Memphian	4
I think Bluma should do it 😊. Another idea is to have a community professional to work in the broader community to educate and inform about the Jewish community	3
Train us how to respond. Keep security director!	3
Not only open Jewish events to others but attend other's events as an accepting Jew.	3
Be informed and communicate to our community	3
Meet with the community churches to raise the awareness	2
Educate	1
Let people know the importance of what is going on in our community and in the world	1

Have a rally at Shelby farms or somewhere public and invite the smaller jewish communities around the south to join us.	1
Meet with community churches	1
Have resources ofr	1

- What more can we do to inspire donors to make capacity gifts?

Response	Net Votes
Continue to educate community on how money is used.	12
Understanding their passions/priorities ahead of time.	8
storytelling of an individual and how the fund helped them	8
Meet donors to understand what their philanthropic passions are and attempt to address them.	7
give each donor a compelling reason to give more based on interests	4
Invite them to participate in federation funded agencies	4
Small gatherings in people's homes	4
Bring up rising cost of security and importance of Jewish education	3
More educational pieces on where overseas dollars go.	3
Educate people on the importance of what we do and how it impacts others	3
Have Laura solicit them :)	2
Need to use data to understand what donors are passionate about	2
Do a better job informing them what federation does. At our events, taste of Israel....etc have a short informational session	1
Special events for them	1

### Impact Presentation

Sarah VanderWalde a parent of a Bornblum Jewish Community School spoke about her introduction to the School Counselor. Mrs, VanderWalde explained how the counselor handled conflict resolution and coping Schools. The joint School Caounselor, Vanessa Akeredolu was introduced.

Gary Kaplan reviewed the Jewish Education Collaborative Grant Funding Policy. Jill Shanker questioned the difference between this policy and the one we approved at the September 2019 Board Meeting. Laura Linder explained that this policy states HOW the funds can be utilized. Gary Kaplan called for approval of the Jewish Education Collaborative Grant Funding Policy. Scott Notowich moved to approve the Jewish Education Collaborative Grant Funding Policy, and Sam Chafetz seconded the motion.

Laura Linder gave the Presidents Report and reviewed the 2019 Women's Spiritual Journey and the 2019 Momentum Mom's Mission Trip to Israel. The board used Poll Everywhere to give real-time suggestions on how to engage mission trip participants. The information was captured online

Scott Notowich, VC Israel & Overseas introduced our local JAFI representative Hal Applebaum and our guest speaker, Rabbi Chashi Freedman, Director of Education for Nativ. Nativ provides immigrant soldiers with an affirmative, cross-denominational way to connect to their Jewish roots

## President's Report

- Women's Luncheon is January 16, 2020
- Mrs. Linder called on Mrs. Alla Olswanger Lubin to speak about the Bornblum fundraiser that is honoring JCP
- Dip Jar – credit card instant machine that we are using to raise money for the Meals Program
- Thank you to Sarah for the amazing PAG directory
- Young leadership mission February 2021. The cost will be \$2500 /person + airfare. We will be subsidizing \$1,000. This will be a Ben Gurion Mission where the target age is less than 40
- JWRP Dad's Mission – October 23 – November 1, 2020. Call Michael Barnett if you or someone you know is interested.
- After the meeting, please poke your head in the social Hall to see the event that the Teen Professional Council planned for our teens (approx. 46 attended)

The meeting was adjourned at 6:29 pm.

**JCP Inc. and Related Entities**  
**Statement of Financial Position - Accrual Basis**  
**As of November 30, 2019**

**Unaudited and Preliminary**

	<b>Combined</b>	<b>Federation</b>	<b>Foundation</b>	<b>JCP</b>
<b>Assets</b>				
<i>Cash and Equivalents</i>	21,047,253	1,932,087	19,115,166	-
<i>Pledges Receivable, net of allowances</i>	4,344,417	2,274,417	2,070,000	-
<i>Prepaid Expenses</i>	49,377	47,924	1,453	-
<i>Property and Equipment, net of depreciation</i>	378,687	321,490	57,197	-
<i>Investments</i>	85,417,386	16,674,338	68,743,048	-
<b>Total Assets</b>	<b>111,237,120</b>	<b>21,250,256</b>	<b>89,986,864</b>	<b>-</b>
<b>Liabilities and Equity</b>				
<i>Accounts Payable</i>	59,553	17,138	-	42,415
<i>Allocations Payable</i>	1,319,601	1,303,726	15,875	-
<i>Assets Held For Others</i>	13,380,367	-	13,380,367	-
<i>Due To/From Affilites</i>	-	(42,144)	-	42,144
<b>Net Assets - Equity</b>	<b>96,477,599</b>	<b>19,971,536</b>	<b>76,590,622</b>	<b>(84,559)</b>
<b>Total Liabilities and Equity</b>	<b>111,237,120</b>	<b>21,250,256</b>	<b>89,986,864</b>	<b>-</b>

JCP FY 2019-2020

Administration and Fundraising Budget (Condensed)

For the Five Months Ended November 30, 2019

	----- FEDERATION -----			----- FOUNDATION -----		
	MJF	MJF	MJF	JFOM	JFOM	JFOM
	Budget 2019-20	Actual 11 30 2019	Budget Remaining	Budget 2019-20	Actual 11 30 2019	Budget Remaining
<b>Revenues</b>	<b>1,419,185.00</b>	<b>547,907.00</b>	<b>871,278.00</b>	<b>571,650.00</b>	<b>244,125.00</b>	<b>327,525.00</b>
<b>Expenses</b>						
<b>Personnel</b>	<b>905,644.00</b>	<b>355,752.00</b>	<b>549,892.00</b>	<b>403,274.00</b>	<b>179,463.21</b>	<b>223,810.79</b>
<b>Professional Development</b>	<b>15,000.00</b>	<b>10,205.14</b>	<b>4,794.86</b>	<b>7,500.00</b>	<b>2,402.45</b>	<b>5,097.55</b>
<b>Office Supplies and Printing</b>	<b>29,725.00</b>	<b>13,232.02</b>	<b>16,492.98</b>	<b>37,765.00</b>	<b>32,595.25</b>	<b>5,169.75</b>
<b>Occupancy</b>	<b>62,165.00</b>	<b>47,506.50</b>	<b>14,658.50</b>	<b>13,325.00</b>	<b>5,536.90</b>	<b>7,788.10</b>
<b>Telephnone, Postage and Internet</b>	<b>14,196.00</b>	<b>4,562.00</b>	<b>9,634.00</b>	<b>11,144.00</b>	<b>3,011.27</b>	<b>8,132.73</b>
<b>Marketing (General Branding)</b>	<b>29,845.00</b>	<b>18,226.14</b>	<b>11,618.86</b>	<b>6,055.00</b>	<b>605.40</b>	<b>5,449.60</b>
<b>Fundraising</b>	<b>51,000.00</b>	<b>32,649.47</b>	<b>18,350.53</b>	<b>9,000.00</b>	<b>1,738.79</b>	<b>7,261.21</b>
<b>YAD</b>	<b>10,000.00</b>	<b>633.00</b>	<b>9,367.00</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Community Impact</b>	<b>218,250.00</b>	<b>34,347.48</b>	<b>183,902.52</b>	<b>52,000.00</b>	<b>9,181.64</b>	<b>42,818.36</b>
<b>GA / Leadership</b>	<b>5,000.00</b>	<b>259.00</b>	<b>4,741.00</b>	<b>1,000.00</b>	<b>139.65</b>	<b>860.35</b>
<b>Other Expense</b>	<b>78,000.00</b>	<b>42,013.91</b>	<b>35,986.09</b>	<b>26,640.00</b>	<b>3,834.09</b>	<b>22,805.91</b>
<b>Total Expenses</b>	<b>(1) 1,418,825.00</b>	<b>559,386.66</b>	<b>859,438.34</b>	<b>567,703.00</b>	<b>238,508.65</b>	<b>329,194.35</b>
<b>Surplus (Deficit)</b>	<b>360.00</b>	<b>(11,479.66)</b>	<b>11,839.66</b>	<b>3,947.00</b>	<b>5,616.35</b>	<b>(1,669.35)</b>

**JCP FY 2019-2020**

**Schedule of Revenue Realization**

**For the Five Months Ended November 30, 2019**

----- FEDERATION -----

	MJF Budget 2019-20	MJF Actual 11 30 2019	MJF Budget Remaining
<b>Federation Revenues</b>			
<b>Campaign &amp; Endowment Sources</b>	1,147,985.00	478,753.00	
<b>Corporate Sponsorships</b>	75,000.00	11,000.00	
<b>Tributes</b>	7,500.00	2,654.00	
<b>Event Income</b>	32,500.00	-	
<b>Security Assessments</b>	55,000.00	55,500.00	
<b>Security Grants</b>	100,000.00	-	
<b>Outside Grant</b>	1,200.00	-	
<b>Foundation Revenues</b>			
Interest Income			
Fee Income - DA			
Fee Income Designated			
Fee Income Agency			
Fee income - Trust			
Fee Income - Support Income			
Agency Participation			
Corporate Sponsorships			
B'nai Tzedek			
Legacy Society			
Operating Endowmwnt			
Contributions			
Prior Year surplus			
	<b>1,419,185.00</b>	<b>547,907.00</b>	<b>-</b>

----- FOUNDATION -----

	JFOM Budget 2019-20	JFOM Actual 11\ 30 2019	JFOM Budget Remaining
	7,250.00	3,569.93	
	305,000.00	158,790.56	
	23,000.00	10,539.77	
	15,400.00	8,434.27	
	-	-	
	61,500.00	32,160.67	
	20,000.00	12,002.50	
	-	-	
	15,000.00	-	
	2,500.00	-	
	59,500.00	14,717.99	
	12,500.00	3,909.09	
	50,000.00	-	
	<b>571,650.00</b>	<b>244,124.78</b>	<b>-</b>

JCP FY 2019-2020  
Administration and Fundraising Budget (Detail)

		----- FEDERATION -----				----- FOUNDATION -----			
		2019-2020	2018-19	2019-20	2019-20	2019-2020	2018-19	2019-20	2019-20
		Budget	Budget	Actual	Projection	Budget	Budget	Actual @	Projection
		@ 11.30.2019				11.30.2019			
<b>INCOME</b>									
Unrestricted Campaign Grant for Admin & Fundraising	N/A	450,000	450,000	187,500					
Unrestricted Campaign Grant for Programming	N/A	447,000	350,000	186,259					
Lemsky Admin fee	10-3005	106,355	93,824	44,315					
Operating Endowment Fee	10-3005	88,629	78,187	36,929					
Corporate Sponsorship	10-3011	75,000	125,000	11,000					
Tributes	10-3111	7,500	10,000	2,654					
Event Income (Non-YAD) - A Taste of Israel	10-3132	30,000	35,000	-					
Miscellaneous Income (e.g. Donations, reimbursements, etc.)	10-3312	20,000	20,000	-					
Outside Grant (HG Foundation for PJ Staffing)	10-3313	1,200	1,200						
YAD Event Income	32-3321	2,500	2,500						
Meals Program Administrative Management Fee	10-3221	5,000	5,000	2,083					
Scholarship-Management fee	10-3219	1,000	1,000	417					
Hillel Management Fee	10-3220	15,000	15,000	6,250					
JFS Marketing Grant and Campaign Launch	10-3131	15,000	15,000	15,000					
Security Grant from DHS through State of Tennessee	37-3328	100,000	-						
Security Grant from MJF Campaign	37-3130	30,000	-	30,000					
Security Assessments - Agencies	37-3329	25,000	55,000	25,500					
<b>TOTAL REVENUE</b>		<b>1,419,185</b>	<b>1,256,711</b>	<b>547,907</b>	<b>-</b>	<b>571,650</b>	<b>553,050</b>	<b>244,125</b>	<b>597,199</b>
<b>Personnel</b>									
Salaries	10-5011	737,600	649,105	279,030	40-5011	329,647	345,775	145,328	
Federal and State Payroll Taxes	10-5013	57,164	50,307	18,592	40-5013	25,548	26,797	9,151	
Worker's Compensation	10-5015	1,350	1,350	1,185	40-5015	1,350	1,350	697	
Medical,Dental,Disability,Life Ins (Assumes 5% Increase)	10-5111	59,030	45,250	33,894	40-5111	11,520	10,718	8,023	
Pension Plan	10-5112	32,500	35,337	14,301	40-5112	17,209	17,240	7,663	
WTD / Contract Acctg / Retirement Plan Services	10-5016	18,000	18,250	8,750	40-5016	18,000	18,250	8,600	
		<b>905,644</b>	<b>799,599</b>	<b>355,752</b>	<b>-</b>	<b>403,274</b>	<b>420,130</b>	<b>179,463</b>	<b>-</b>
<b>PROFESSIONAL DEVELOPMENT</b>									
Conferences and Meetings	10-5411	15,000	15,000	10,205	40-5411	7,500	7,500	2,402	
<b>SUPPLIES AND PRINTING (65/35)</b>									
Office Supplies & General Printing (Letterhead, envelopes, etc.)	10-5211	10,775	8,775	6,711	40-5211	5,725	4,725	3,745	
Computer Maintenance	10-5214	2,750	2,750	894	40-5214	1,470	1,470	596	
Software Licenses & Outsourced Report Writing (not subject to 65/35)	10-5212	10,500	12,500	1,571	40-5212	27,500	25,000	25,974	
Printer Contracts, monthly fees& Maintenance	10-5213	5,700	5,700	4,056	40-5213	3,070	3,070	2,280	
		<b>29,725</b>	<b>29,725</b>	<b>13,232</b>	<b>-</b>	<b>37,765</b>	<b>34,265</b>	<b>32,595</b>	<b>-</b>
<b>OCCUPANCY</b>									
MJCC Occupancy	10-5311	51,960	49,509	43,300	40-5311	7,830	7,830	3,425	
Insurance	10-5312	9,165	9,165	3,908	40-5312	4,935	4,935	2,031	
Controlled Access fees and maintenance	10-5510	1,040	1,040	299	40-5510	560	560	81	
		<b>62,165</b>	<b>59,714</b>	<b>47,507</b>	<b>-</b>	<b>13,325</b>	<b>13,325</b>	<b>5,537</b>	<b>-</b>
<b>TELEPHONE, POSTAGE, INTERNET (65/35)</b>									
Telephone	10-5511	3,445	3,445	1,557	40-5511	1,855	1,855	919	
Postage	10-5512	6,110	6,110	1,809	40-5512	3,290	3,290	1,448	
Internet & Website	10-5519	4,641	4,641	1,196	40-5519	5,999	5,999	644	
		<b>14,196</b>	<b>14,196</b>	<b>4,562</b>	<b>-</b>	<b>11,144</b>	<b>11,144</b>	<b>3,011</b>	<b>-</b>
<b>Marketing (General Branding 65/35) - Matt</b>									
Advertising (e.g. 4 full page ads in HW)	10-5414	4,745	4,745	995	40-5414	2,555	2,555	177	
Annual Report (including design, printing and mailing)	10-5612	7,500	13,900	234	40-5612	2,100	2,100	126	
2 Newsletters (including design, printing and mailing)	10-5417	2,600	2,600	1,260	40-5417	1,400	1,400	302	
JFS Marketing	10-6019	15,000	15,000	15,738		-	-	-	
		<b>29,845</b>	<b>36,245</b>	<b>18,226</b>	<b>-</b>	<b>6,055</b>	<b>6,055</b>	<b>605</b>	<b>-</b>
<b>Fundraising - MJF and JFOM</b>									
Marketing	15-6018	15,000	15,000	14,939	40-6018	4,500	4,500	1,505	
Events (includes Outsourcing Coordination)	15-4125	20,000	15,000	10,235	40-4125	2,500	2,500	-	
Lion of Judah	15-6100	10,000	10,000	6,152		-	-	-	
Donor Cultivation (lunches/coffee)	15-6101	5,000	4,000	1,099	40-6101	1,250	1,250	131	
General Meeting expense (e.g. food for planning meetings)	15-6102	1,000	1,000	225	40-6102	750	750	103	
		<b>51,000</b>	<b>45,000</b>	<b>32,649</b>	<b>-</b>	<b>9,000</b>	<b>9,000</b>	<b>1,739</b>	<b>-</b>
<b>YAD and all related costs including marketing, printing, etc. - Lauren</b>									
Fundraising (e.g. events, special marketing, etc.)	32-4116	7,500	7,500	78		-	-	-	
Engagement Programming	32-6103	2,500	2,500	555		-	-	-	
		<b>10,000</b>	<b>10,000</b>	<b>633</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>	<b>-</b>
<b>Programming and Community Impact (includes marketing)* Bluma</b>									
Costs for Administering Grants (copying, meeting expense - i.e.. Food)	37-6200	1,750	1,750			-	-	-	
Task Forces (Senior Services, Teen Professionals, Special Needs .etc.)	37-6201	1,000	2,500			-	-	-	
Holocaust Remembrance	37-6202	7,500	7,500	146		-	-	-	
Newcomers	37-6203	3,000	3,000	1,517		-	-	-	
Israel Advocacy (mostly marketing and possibly a program)	37-6204	2,500	5,000			-	-	-	
CRC - dues for Israel Action Network, JCPA, interfaith activities, etc.	37-5635	5,000	5,000	620		-	-	-	
General Program expense (food for meetings/gatherings for programs not list)	37-6205	2,500	2,500	877		-	-	-	
Security Council & Emergency Alert System	37-6206	55,000	60,000	28,954		-	-	-	
Security - DHS Grants for Agencies	37-6213	100,000		585		-	-	-	
Study - Southern Growth (Board Priority Setting)	37-6214	5,000	-		40-6214	5,000	-		
Professional Advisors		-	-		40-6207	2,000	2,000	2,093	
B'nai Tzedek		-	-		40-4374	15,000	15,000		
JFOM 25th Anniversary		-	-		40-6212	30,000	-	7,089	
A Taste of Israel	37-6211	35,000	50,000	1,649		-	-	-	
		<b>218,250</b>	<b>137,250</b>	<b>34,347</b>	<b>-</b>	<b>52,000</b>	<b>17,000</b>	<b>9,182</b>	<b>-</b>
<b>Leadership Development (including General Assembly )</b>	<b>10-5622</b>	<b>5,000</b>	<b>8,500</b>	<b>259</b>	<b>40-5622</b>	<b>1,000</b>	<b>1,500</b>	<b>140</b>	<b>-</b>
<b>OTHER EXPENSE</b>									
Annual Meeting	10-5611	1,500	1,500	1,401	40-5611	1,500	1,500	1,206	
Auditing	10-5613	20,500	20,500	-	40-5613	19,000	19,000	-	
Dues and Subscriptions	10-5619	3,500	5,000	464	40-5619	2,000	2,000	1,424	
Capital Reserve/Community Ed	10-5630	15,000	17,500			-	-	-	
Bank Fees/Credit Card	10-5513	15,000	15,000	2,437	40-5513	1,140	1,140	167	
Miscellaneous	10-5627	5,000	5,000	12	40-5627	1,500	2,000	1,000	
Endowment Support	10-5633	5,000	12,500	3,338		-	-	-	
Office Enhancements	10-5317	2,500	5,000	7,556	40-5317	-	-	-	
Recruiting	10-5412	-	-	24,737		-	-	-	
Community Participation and Outreach (Tables, Ads, Etc)	10-5520	10,000	16,000	2,070	40-5520	1,500	4,000	38	
		<b>78,000</b>	<b>98,000</b>	<b>42,014</b>	<b>-</b>	<b>26,640</b>	<b>29,640</b>	<b>3,834</b>	<b>-</b>
<b>TOTAL ADMINISTRATIVE EXPENSES</b>		<b>1,418,825</b>	<b>1,253,229</b>	<b>559,387</b>	<b>-</b>	<b>567,703</b>	<b>549,559</b>	<b>238,509</b>	<b>-</b>
<b>Net Surplus/(Deficit)</b>		<b>360</b>	<b>3,482</b>	<b>(11,480)</b>	<b>-</b>	<b>3,947</b>	<b>3,491</b>	<b>5,616</b>	<b>597,199</b>

NOTE: PROGRAMMATIC EXPENSES RELATED TO MJF PROGRAMS SUCH AS PJ LIBRARY, KOSHER MEALS FOR SENIORS, ISRAEL SCOUTS, SHOHAM PARTNERSHIP, ISRAEL MISSIONS AND SECURITY HAVE STANDALONE BUDGETS AND ARE NOT REFLECTED ABOVE.

## JEWISH FOUNDATION OF MEMPHIS AGENCY NEEDS LIST



- \$175** – Handheld pool vacuum and attachments for cleaning the ASBEE Mikvah
- \$1,000**– Purchase and installation of RING security doorbell to provide access control during daily services
- \$1,500**– Two Desktop PCs for Executive Director and Volunteer’s Work Stations – Replacements for Outdated and SLOW Computers



- \$1,500** – For additional security radios
- \$3,000** – Transportation and expenses for one Yeshiva University Fellows Visit
- \$4,000** – Installing lucite liners on sanctuary bookshelves to reduce need for repeated painting & repair
- \$6,000** – New internal sound system to improve hearing quality for seniors.
- \$12,000** – Repairs to major holes in pavement in our driveway and parking lots.



- \$5,000** – Replacing/updating old thermostats
- \$6,000** – Upgrading computers to operate on current standard software
- \$7,500** – Upgrade phone and voicemail system
- \$15,000** – Repairs to a leaking wall in the roof



- \$3000** - 3D Printer
- \$5000** - paint rusted security fence
- \$6000** - 20 iPads for technology integration for two grades
- \$7500** - 15 laptops for technology integration for one grade (2 grades requested, total of \$15000)
- \$8000** - Update Classroom furniture consisting of desks, chairs and flexible seating options (per classroom)



- \$170** – PJ Library tablecloth
- \$399** – Printer for JFOM
- \$500** – JFOM Past President Pictures Framed
- \$1,000** – Security Training Sessions (\$1,000 each – need 5)
- Frequent Flyer Miles** for 2021 Young Adult Mission Trip to Israel

## JEWISH FOUNDATION OF MEMPHIS AGENCY NEEDS LIST



- \$1,500** - Upgrade to smart thermostats to increase energy efficiency.
- \$3500**- Install security gate in Beit Midrash for increased protection of valuable Judaica
- \$5000**- Replace worn fascia board around exterior of the school
- \$7,500**- Install privacy shades on exterior windows to reduce unwanted visibility into classrooms
- \$10,000** - Renovate outdated breezeway to increase security and avoid further weather damage



- \$10 to \$100** – Purchase food for JFS Kosher Food Pantry
- \$1,340**– 100 Kosher Home-delivered Frozen Meals for home-bound Seniors



- \$2,500** - Moveable Basketball goals for growing JCC youth Basketball program - We are in need of 8 - **1 FUNDED**
- \$4,000** – Athlete scholarships for JCCA Maccabi Games 2020
- \$9,500** - Additional security cameras in Early Childhood Center and the outside pavilion
- \$15,000** – **new social hall chairs**
- \$15,000** - New Shade sail for ECC Toddler playground to protect children from sun (6 needed)



- \$349** Seated Elliptical for Restorative Nursing Program exercise gym
- \$4,846** Accushield Visitor Sign In System for reception desk- includes kiosk and 1 year of service fees
- \$5,592** Digital clocks with cell phone chargers for patient and resident rooms (160 for \$34.95 each)
- \$6,071** NuStep Recumbent Cross Trainer for Restorative Nursing Program exercise gym
- \$10,000** New website design



### TEMPLE ISRAEL

- \$500/per student** – Wendy & Avron Fogelman Religious School Scholarships for Jewish educational and travel experiences
- \$5,000/per student** – Barbara K. Lipman Early Learning Center scholarships
- \$50,000** – Security Notification System