

As of 2/08/20



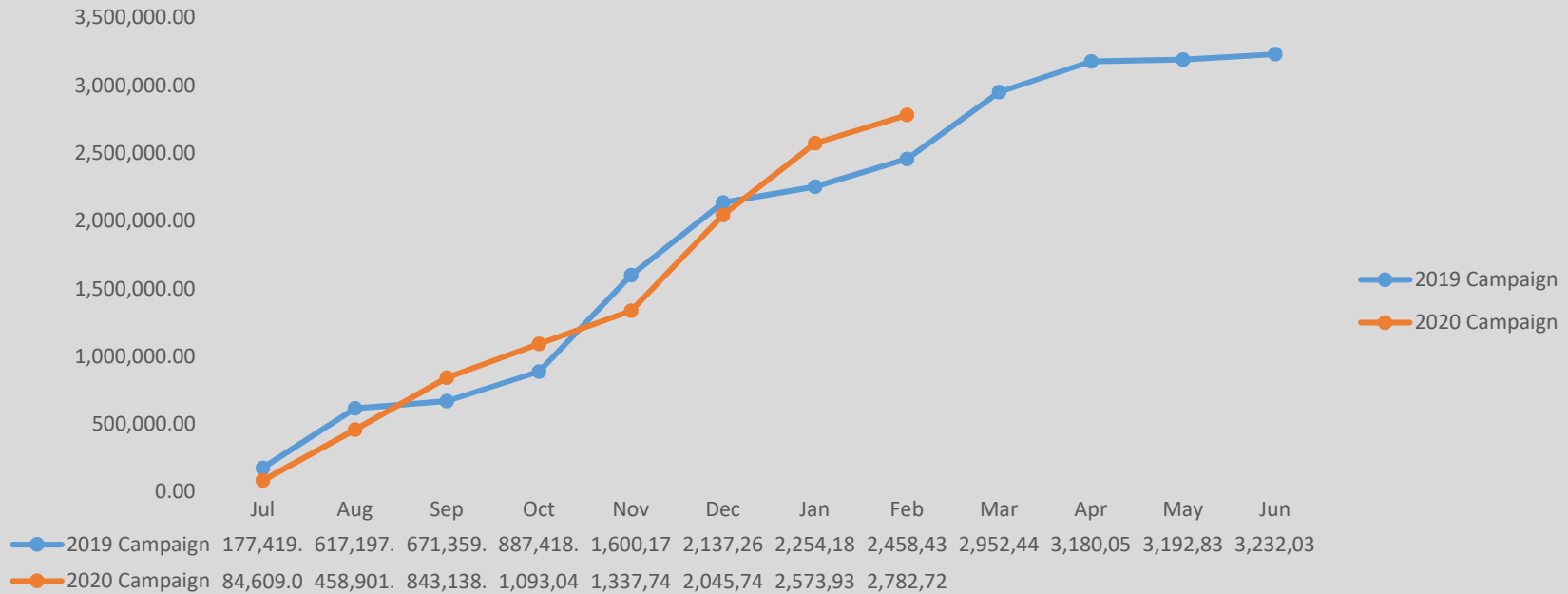
2020 Annual Community Campaign			JFS Endowment Campaign		Sponsorships	
July	\$84,609.00	32	July	\$0.00	July	\$0.00
August	\$374,292.94	33	August	\$0.00	August	\$18,000.00
September	\$384,236.53	68	September	\$3,550,000.00	September	\$5,000.00
October	\$249,901.60	102	October	\$85,000.00	October	\$6,500.00
November	\$244,709.59	96	November	\$85,000.00	November	\$0.00
December	\$707,998.47	496	December	\$262,150.00	December	\$20,400.00
January	\$528,189.71	234	January	\$495,500.00	January	\$7,500.00
<b>February</b>	<b>\$208,784.55</b>	<b>215</b>	<b>February</b>	<b>\$5,000.00</b>	<b>February</b>	<b>\$1,000.00</b>
March	\$0.00		March	\$0.00	March	\$0.00
April	\$0.00		April	\$0.00	April	\$0.00
May	\$0.00		May	\$0.00	May	\$0.00
June	\$0.00		June	\$0.00	June	\$0.00
	<b>\$2,782,722.39</b>	1276		<b>\$4,482,650.00</b>		<b>\$58,400.00</b>
Unrestricted:	\$2,324,081.86	\$2,402,730.20				(included in
Local:	\$78,648.34					campaign ttl)

\*\$19,005 (53 pledges) has come in from the January mailer that went out 1/17.

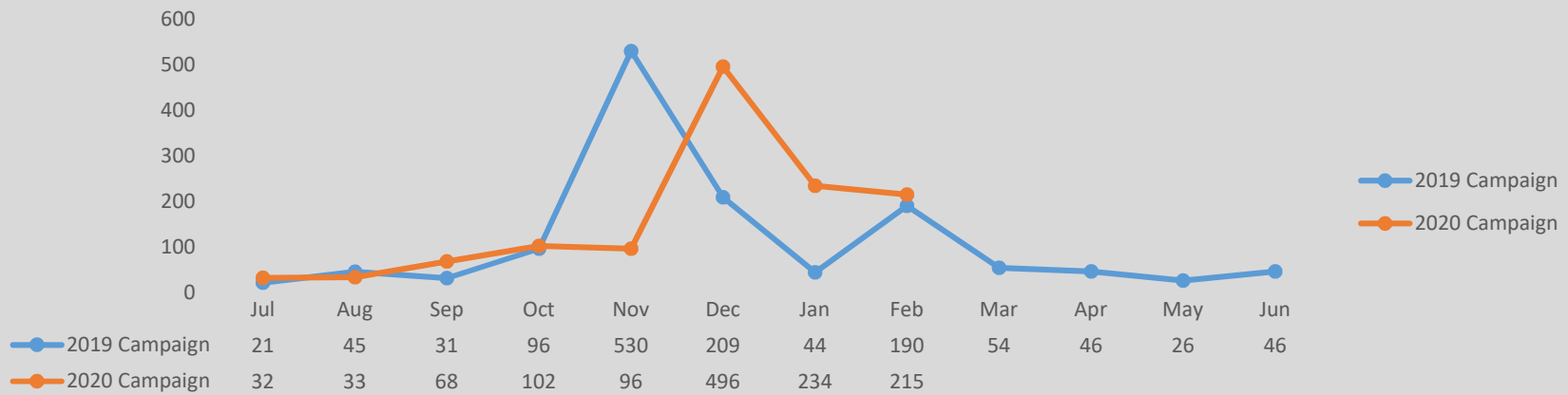
**PLOUGH CHALLENGE:** **\$182,474** 121.65%

NEW (87) \$78,090  
 Increased (277) \$104,383.61

### Annual Community Campaign 2019 v 2020



### Number of Donors by Month



**\*\* NOTE: Super Sunday was in November 2018 for the 2019 campaign. Held in Feb for 2020 campaign.**

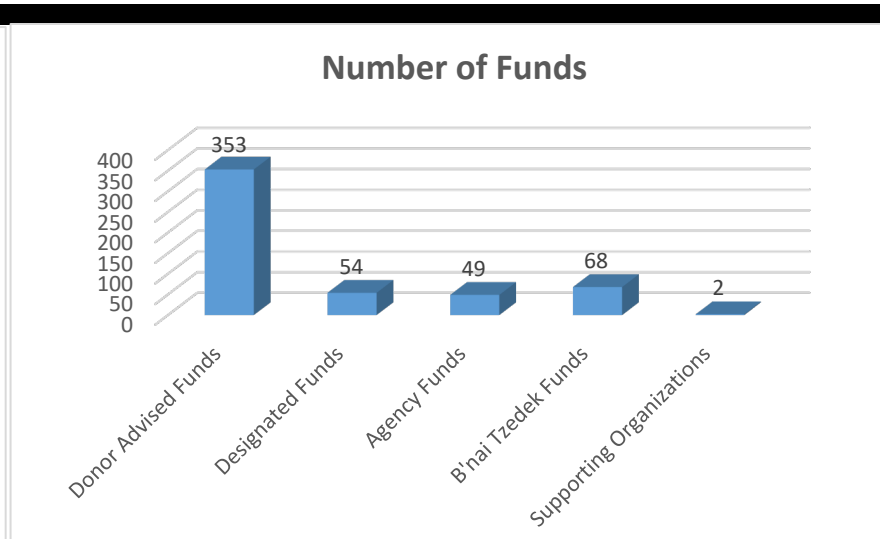
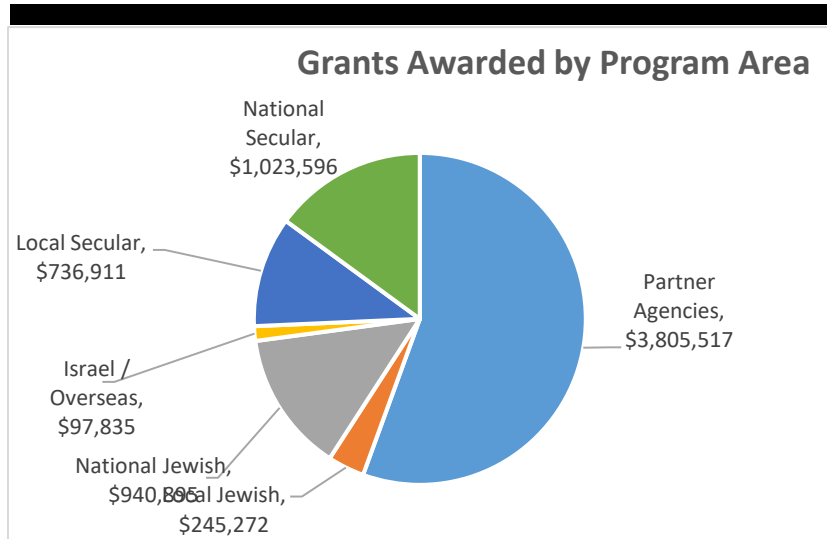
<b>Corporation</b>	<b>2020 Sponsorship</b>	<b>2019 Sponsorship</b>	<b>Difference</b>	<b>LEVEL</b>
SunTrust Bank Sun Trust Bank	\$28,000.00	\$15,000.00	\$13,000.00	Platinum
Kelman-Lazarov	\$5,400.00	\$1,800.00	\$3,600.00	Silver
Duncan Williams	\$5,000.00	\$0.00	\$5,000.00	Silver
Gould's	\$5,000.00	\$0.00	\$5,000.00	Silver
Paragon National Bank	\$5,000.00	\$5,000.00	\$0.00	Silver
Robert Irwin Jewelers	\$3,000.00	\$1,800.00	\$1,200.00	Bronze
AutoZone	\$2,500.00	\$1,800.00	\$700.00	Bronze
Legacy Wealth Management	\$2,500.00	\$1,800.00	\$700.00	Bronze
Jewish Scene - IN-KIND	\$2,000.00	\$0.00	\$2,000.00	Friends
Roadshow BMW	\$1,000.00	\$0.00	\$1,000.00	Friends
Spark Printing IN-KIND	\$1,000.00	\$1,000.00		
Evolve Bank		\$1,000.00		
Pinnacle Bank		\$3,600.00		
Olymbec USA LLC		\$5,000.00		
	<b>\$57,400.00</b>	<b>\$37,800.00</b>	<b>\$32,200.00</b>	
	(excludes In-Kind)			

**JFOM Dashboard**  
**FY Activity July 2019 - January 15, 2020**



	<b>Gifts</b>	<b>Value</b>	<b>Grants Awarded</b>	<b>Value</b>
Donor Advised Funds	\$4,691,907	\$ 23,494,585	Partner Agencies	\$3,805,517
Designated Funds	\$242,047	\$ 6,829,258	Local Jewish	\$245,272
Agency Funds	\$1,750,024	\$ 16,455,628	National Jewish	\$940,895
B'nai Tzedek Funds	\$4,000	\$ 229,030	Israel / Overseas	\$97,835
Supporting Organizations	\$90	\$ 38,969,326	Local Secular	\$736,911
<b>TOTAL</b>	<b>\$6,688,068</b>	<b>\$ 85,977,827</b>	National Secular	\$1,023,596
			<b>TOTAL</b>	<b>\$6,850,026</b>

<b>Number of Funds</b>	<b>New</b>	<b>Total</b>	<b>Investment Returns:</b>	<b>YTD (Calendar as of 11/30/2019)</b>
Donor Advised Funds	11	353	JCEP	13.10%
Designated Funds	2	54	Short Term Bond Index 100% Fixed	4.76%
Agency Funds	16	49	LifeStrategy Income 20% Equity/80% Fixed	11.51%
B'nai Tzedek Funds	10	68	LifeStrategy Conservative Growth 40% Equity/60% Fixed	14.27%
Supporting Organizations	<u>2</u>	<u>2</u>	LifeStrategy Moderate Growth 60% Equity/40% Fixed	17.11%
<b>TOTAL</b>	<b>39</b>	<b>526</b>	LifeStrategy Growth 80% Equity/20% Fixed	19.91%
			Stock Market Index Fund 100% Equity	27.16%
			Israel ETF - ISRA	26.53%





Charity Navigator and GuideStar are the two largest independent evaluators and raters of nonprofits. Nonprofits that obtain the highest ratings from these two evaluators are looked upon favorably by donors. While reviewing our status and what is required to achieve the top scores, we found a few deficiencies. An example is updating our website with the most recent 990s. If you recall, Haartz did a deep dive into the 990s including ours. Having the highest ratings is very important. The documents before you today are policies that we currently do not have in place. Having them will raise our scores with both evaluators as well as being a good practice for the companies to have such policies.

## **Employee Benefits Procedures**

This document lays out the steps and procedures for determining the salaries and benefits of employees of Jewish Community Partners, Inc. (the “Company”).

Two committees of the Company will be involved with the process:

1. Compensation Committee
2. Personnel Committee

### **Committee Duties and Responsibilities**

#### **Compensation Committee**

Members:

- Chair of the Company
- Immediate Past Chair
- Treasurer
- Chair of the Personnel Committee

Duties:

- Oversees process of hiring and firing the President and conducts annual evaluation.
- Prior to the annual budgeting process, meets to review and approve compensation and benefits of the President of the Company and review the President’s recommendations for employee salaries and benefits.
- Prepares total salary and benefit figures which are then provided to the budget committee for inclusion in the budgeting process.

#### **Personnel Committee**

Members:

- Chair who is a member of the Company Board of Directors
- Up to 4 additional members of the Board of Directors

Duties:

- Conducts bi-annual review of employee manual and drafts changes when deemed necessary.
- Reviews the benefits package bi-annually including non-salary related benefits such as retirement plan, paid-time-off and medical benefits.

**Board of directors ultimately approves salary and benefits as part of the total operating expenses of the Company.**

## **Donor Privacy Policy**

Jewish Community Partners, Inc. (the “Company”) respects the privacy of all donors. We believe in safeguarding personal information and ensuring that donor privacy is protected. Your name, address and any other personal data you provide will be used by the Company to keep you informed of our activities including our programs, social services, special events, Jewish community needs and associated (or corresponding) funding needs. If at any time you choose not to receive these communications, you may contact the Company and we will gladly remove your name from our mailing list.

The Company respects all donor requests to remain anonymous.

### **Electronic Personal Records**

Donor information is maintained in a secured database, and only authorized personnel have access to this information and only for appropriate business purposes.

### **Mailing Lists**

The Company does not rent or sell its donor lists or any information contained on those lists. Donor information is used by the Company for charitable purposes as described above. To review personal information collected and/or request changes, please contact Michael Barnett, Chief Operating Officer, at 901-767-7100.

### **Authorized Release of Information**

The Company may be legally required to disclose information on occasion. If this were to happen, our donors would be informed. The Company complies with all applicable legal requirements and standards.

# **Document Retention and Destruction Policy**

## **I. Purpose**

This Document Retention and Destruction Policy (Policy) provides for the systematic review, retention and destruction of documents received or created by Jewish Community Partners, Inc. (the “Company”) in connection with the transaction of the Company business. This Policy covers all records and documents, regardless of physical form (including electronic documents), contains guidelines for how long certain documents should be kept and how records should be destroyed. The Policy is designed to ensure compliance with federal and state laws and regulations, to eliminate accidental or innocent destruction of records and to facilitate the Company operations by promoting efficiency and freeing up valuable storage space.

## **II. Document Retention**

The Company follows the document retention procedures outlined below. Documents that are not listed, but are substantially similar to those listed in the schedule will be retained for the appropriate length of time.

## **III. Corporate Records**

Annual Reports to Secretary of State/Attorney General	Permanent
Articles of Incorporation	Permanent
Board Meeting and Board Committee Minutes	Permanent
Board Policies/Resolutions	Permanent
Bylaws	Permanent
Construction Documents	Permanent
Fixed Asset Records	Permanent
IRS Application for Tax-Exempt Status (Form 1023)	Permanent
IRS Determination Letter	Permanent
State Sales Tax Exemption Letter	Permanent
Contracts (after expiration)	5 years
Correspondence (general)	3 years
Accounting and Corporate Tax Records	
Annual Audits and Financial Statements	Permanent
Depreciation Schedules	10 years
General Ledgers	10 years
IRS 990 Tax Returns	Permanent
Business Expense Records	6 years
IRS 1099s	6 years
Journal Entries	6 years
Invoices	6 years
Sales Records (box office, concessions, gift shop)	3 years

Petty Cash Vouchers	3 years
Cash Receipts	3 years
Credit Card Receipts	3 years
Bank Records	
Check Registers	10 years
Bank Deposit Slips	7 years
Bank Statements and Reconciliation	7 years
Electronic Fund Transfer Documents	7 years
Payroll and Employment Tax Records	
Payroll Registers	Permanent
State Unemployment Tax Records	10 years
Earnings Records	7 years
Garnishment Records	7 years
Payroll Tax returns	7 years
W-2 Statements	7 years
Employee Records	
Employment and Termination Agreements	10 years
Retirement and Pension Plan Documents	10 years
Records Relating to Promotion, Demotion or Discharge	7 years after termination
Accident Reports and Worker's Compensation Records	5 years
Salary Schedules	5 years
Employment Applications	3 years
I-9 Forms	3 years after termination
Time Cards/Sheets	2 years
Donor Records and Acknowledgement Letters	7 years
Grant Applications and Contracts	5 years after completion
Legal, Insurance and Safety Records	
Appraisals	10 years
Copyright Registrations	Permanent
Environmental Studies	Permanent
Insurance Policies	10 years
Real Estate Documents	Permanent
Stock and Bond Records	10 years
Trademark Registrations	Permanent
Leases	6 years after expiration
OSHA Documents	5 years
General Contracts	3 years after termination

#### **IV. Electronic Documents and Records**

Electronic documents will be retained as if they were paper documents. Therefore, any electronic files, including records of donations made online, that fall into one of the document types on the above schedule will be maintained for the appropriate amount of time. If a user has sufficient reason to keep an email message, the message should be printed in hard copy and kept in the appropriate file or moved to an “archive” computer file folder. Backup and recovery methods will be tested on a regular basis.

## **V. Emergency Planning**

The Organization’s records will be stored in a safe, secure and accessible manner. Documents and financial files that are essential to keeping the Organization operating in an emergency will be duplicated or backed up at least every week and maintained off site.

## **VI. Document Destruction**

Document destruction will be suspended immediately, upon any indication of an official investigation or when a lawsuit is filed or appears imminent. Destruction will be reinstated upon conclusion of the investigation.

This Policy was adopted by executive action this \_\_\_\_\_ day of \_\_\_\_\_, 202\_\_.

A true record,

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[Executive’s name & title]

## Whistleblower Policy

Jewish Community Partners, Inc. (the “Company”) encourages its employees to report improper activities in the workplace and will protect employees from retaliation for making any such report in good faith.

### **1. Employee Rights**

Employees have the right to report, without suffering retaliation, any activity by the Company or any of our employees that the employee reasonably believes: 1) violates any state or federal law; 2) violates or amounts to noncompliance with a state or federal rule or regulation; or 3) violates fiduciary responsibilities by a nonprofit corporation. In addition, an employee may refuse to participate in an activity that the employee reasonably believes would result in a violation of state or federal statutes, or a violation or noncompliance with a state or federal rule or regulation.

Employees are also protected from retaliation for having exercised any of these rights in any former employment.

The whistleblower protection laws do not entitle employees to violate a confidential privilege of the Company (such as the attorney-client privilege) or improperly disclose trade-secret information.

### **2. Where to Report**

Employees have the duty to comply with all applicable laws and to assist the Company to ensure legal compliance. An employee who suspects a problem with legal compliance is required to report the situation(s) to the President or Chair of the Board of Directors if the complaint involves the CEO.

Employees may also report information regarding possible unlawful activity to an appropriate government or law enforcement agency.

### **3. Protection from Retaliation**

It is the intent of this policy to encourage employees to report fraudulent or illegal activities and there shall be no retaliation for any reports made pursuant to this policy. Any employee who believes they have been retaliated against for whistle blowing may file a complaint with either the President or the Chair of the Board of Directors. Any complaint of retaliation will be promptly investigated and remedial action taken when warranted. This protection from retaliation is not intended to prohibit managers or supervisors from taking action, including disciplinary action, in the ordinary course of business based on valid performance-related factors.

**Please sign below to confirm you have read and understand the Whistleblower policy:**

\_\_\_\_\_  
Employee Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Employee's typed or printed name




**2019 Outcome Report for Services Provided:**

1. Intake and Referral Calls	375 individual callers
Intake and Referral Interactions	2,931 interactions
2. Shalom Shuttle Rides	2,142 rides provided
Shalom Shuttle Riders	52 individuals served
3. Food Pantry Bags	819 delivered
Food Pantry Recipients	51
4. Kosher Meals	5,748 meals delivered
Kosher Meal Recipients	47 individuals served
5. Birthday Gifts	56 individuals received bags
6. Counseling Services	47 individuals served
7. Special Needs	79 individuals served
8. Case Management	102 individuals served
9. Emergency Assistant Receipts	17 individuals served filling 73 requests

**Unduplicated Client Count**

**401 individuals served**

 Wendy and Avron Fogelman <b>Jewish Family Service</b> <small>at the</small> Memphis Jewish Community Center	Family Sustainers							
	Bronze \$10,000+	Silver \$25,000+	Gold \$50,000+	Caretaker \$100K+	Keeper \$250K +	Protector \$500K +	Guardian \$1 million +	Partner \$2 million +
<b>Donor Honor Roll</b>	YES	YES	YES	YES	YES	YES	YES	YES
<b>Recognition at Community Celebration</b>	YES	YES	YES	YES	YES	YES	YES	YES
<b>Listing on Permanent Plaque in JFS offices</b>	YES	YES	YES	YES	YES	YES	YES	YES
<b>Personal Profile or Dedication in Donor Honor Roll</b>		YES	YES	YES	YES	YES	YES	YES
<b>Your name presented (along with others) on individual offices along with a Mezzuah</b>			YES	YES	YES	YES	YES	YES
<b>Recognized as Family Sustainers at all JFS events and publications</b>				YES	YES	YES	YES	YES
<b>Naming/Dedication*</b>						YES	YES	YES

**\*Naming/Dedication**

- Agency Name
- Seniors
- Special Needs
- Information and Referral
- Families in Crisis
- Emergency Assistance



\$2.5 million TAKEN

Priority area Dedication Opportunities

All donors to the campaign under \$10,000 will be recognized in the donor honor roll