

JCP/MJF Board of Directors – January 8, 2020

TENATIVE

I. Welcome and Approval of Consent Agenda

II. Report on Ambassador Visit

III. FRD Report

- a. Annual Campaign
- b. JFOM
- c. JFS Endowment Campaign Update
- d. Overall financial achievement report

IV. Community Impact

- a. Youth Group Funding – Approval Needed
- b. Kay Saslawsky Leadership Program
- c. Miles for Sarit

V. Discussion Topic

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

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

(Rank the ideas)

VI. Impact Presentation – JFS School Counselor



2020 Annual Community Campaign	
July	\$54,419.65
August	\$354,352.00
September	\$384,813.19
October	\$241,458.60
November	\$246,278.31
December	\$682,187.35
January	\$0.00
February	\$0.00
March	\$0.00
April	\$0.00
May	\$0.00
June	\$0.00
	\$1,963,509.10

JFS Endowment Campaign	
July	\$0.00
August	\$0.00
September	\$3,550,000.00
October	\$85,000.00
November	\$85,000.00
December	\$312,150.00
January	\$0.00
February	\$0.00
March	\$0.00
April	\$0.00
May	\$0.00
June	\$0.00
	\$4,032,150.00

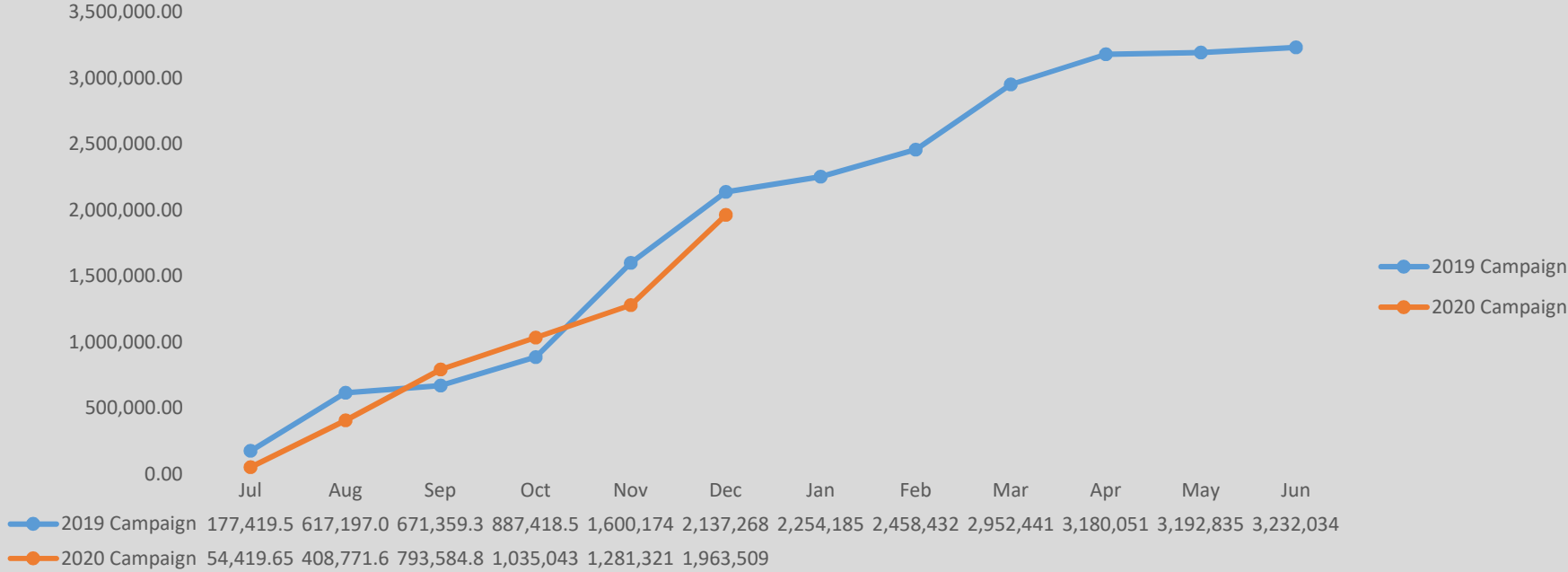
Sponsorships	
July	\$0.00
August	\$18,000.00
September	\$5,000.00
October	\$6,500.00
November	\$0.00
December	\$20,400.00
January	\$0.00
February	\$0.00
March	\$0.00
April	\$0.00
May	\$0.00
June	\$0.00
	\$49,900.00

PLOUGH CHALLENGE:

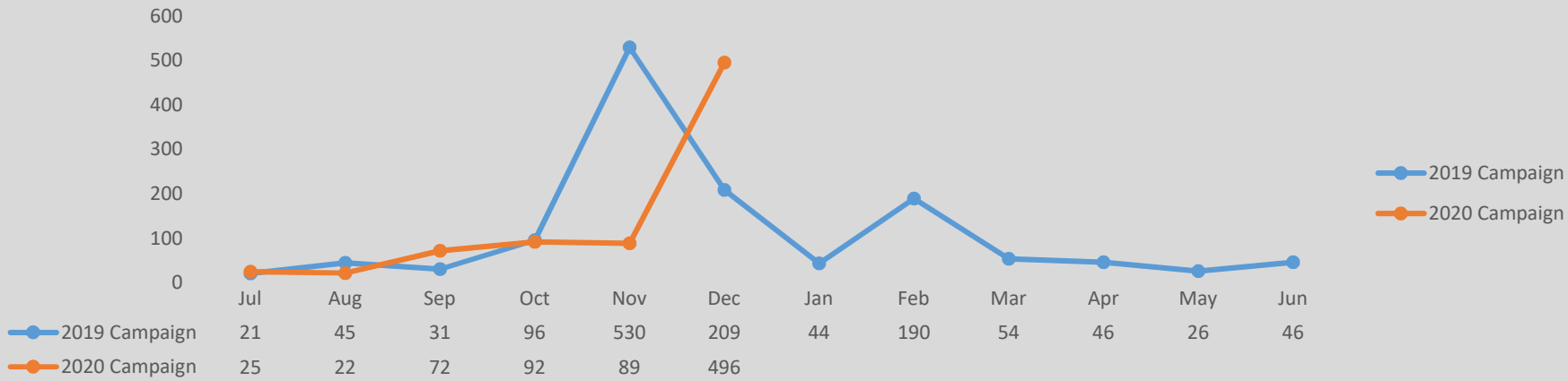
\$136,236 90.82%

NEW (35) \$55,900
 Increased (132) \$80,336.00

Annual Community Campaign 2019 v 2020



Number of Donors by Month



**** NOTE: Super Sunday was in November 2018. We have moved it back to February for this campaign.**

Lookup ID	Last Name	2020 Sponsorship	Difference	2019 Sponsorship	Notes
10021757	AutoZone	\$2,500.00	\$700.00	\$1,800.00	
10022093	Duncan Williams	\$5,000.00	\$5,000.00	\$0.00	Fall LOJ event
10000432	Kelman-Lazarov	\$5,400.00	\$3,600.00	\$1,800.00	Spring LOJ event sponsor + TOI booth
10021694	Evolve Bank			\$1,000.00	met with Becky 12/18 ... touched base 1/3 & she's getting with her marketing guy. Appreciated moving money over to them!
10021695	Pinnacle Bank			\$3,600.00	emailed Lisa to set up meeting; they'll be following back up
10000171	Robert Irwin Jewelers	\$3,000.00	\$1,200.00	\$1,800.00	Impact Luncheon
10000513	Legacy Wealth Management			\$1,800.00	Charles will let me know
10000460	Spark Printing			\$1,000.00	in-kind... will do everything for Super Sunday as in-kind; also did upgrades to Foundation event in-kind
10000454	SunTrust Bank Sun Trust Bank	\$28,000.00	\$13,000.00	\$15,000.00	
10000433	Paragon National Bank			\$5,000.00	
10021513	Olymbec USA LLC			\$5,000.00	meeting 1/10
10021951	Gould's	\$5,000.00	\$5,000.00	\$0.00	
10022030	Roadshow BMW	\$1,000.00	\$1,000.00	\$0.00	
	Sylvia Marks estate	\$0.00	-\$10,000.00	\$10,000.00	
		\$49,900.00	\$19,500.00	\$47,800.00	

* as of December 31, 2019

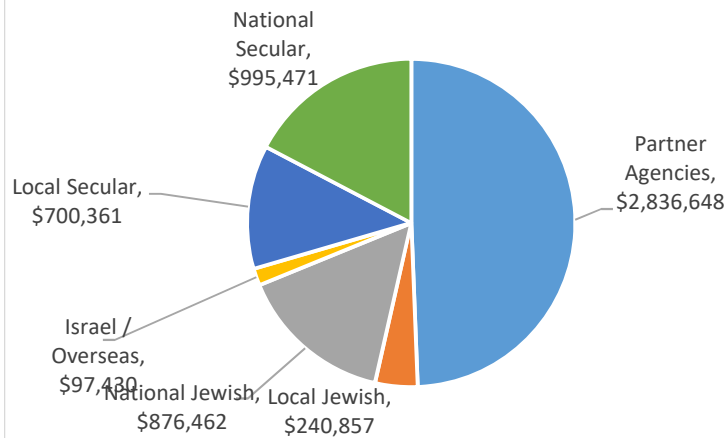
JFOM Dashboard
FY Activity July 2019 - December 2019



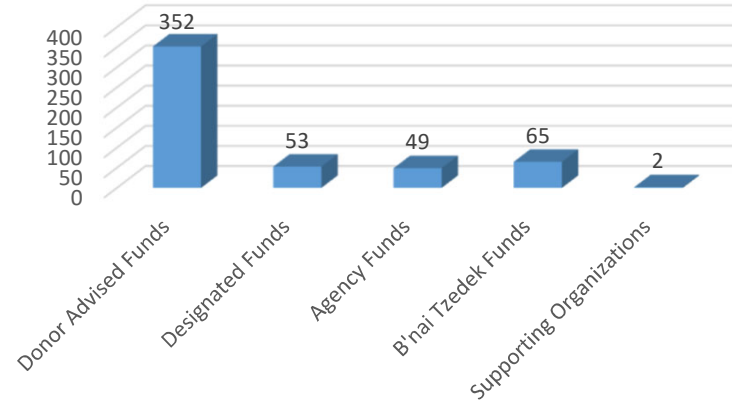
	Gifts	Value	Grants Awarded	Value
Donor Advised Funds	\$4,564,425	\$ 23,427,193	Partner Agencies	\$2,836,648
Designated Funds	\$226,672	\$ 6,499,370	Local Jewish	\$240,857
Agency Funds	\$1,200,429	\$ 15,684,373	National Jewish	\$876,462
B'nai Tzedek Funds	\$3,250	\$ 226,535	Israel / Overseas	\$97,430
Supporting Organizations	\$90	\$ 38,969,326	Local Secular	\$700,361
			National Secular	\$995,471
TOTAL	\$5,994,866	\$ 84,806,797	TOTAL	\$5,747,229

Number of Funds	New	Total	Investment Returns:	YTD (Calendar as of 10/31/2019)
Donor Advised Funds	9	352	JCEP	11.10%
Designated Funds	1	53	Short Term Bond Index 100% Fixed	4.77%
Agency Funds	16	49	LifeStrategy Income 20% Equity/80% Fixed	10.96%
B'nai Tzedek Funds	7	65	LifeStrategy Conservative Growth 40% Equity/60% Fixed	13.13%
Supporting Organizations	<u>2</u>	<u>2</u>	LifeStrategy Moderate Growth 60% Equity/40% Fixed	15.27%
			LifeStrategy Growth 80% Equity/20% Fixed	17.38%
TOTAL	33	521	Stock Market Index Fund 100% Equity	22.53%
			Israel ETF - ISRA	20.39%

Grants Awarded by Program Area



Number of Funds





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

(Adopted by Synagogue Youth Group Funding Task Force, November 2019)