



OVERVIEW AND HISTORY OF THE JEWISH COMMUNITY FOUNDATION OF GREATER HARTFORD

As a community, Greater Hartford offers an intimate sized, vibrant Jewish community where donors are engaged and care deeply about the community's ability to thrive today and into the future. The Jewish Community Foundation of Greater Hartford ("the Foundation" or "JCF") serves as a thought leader sparking innovation, strategically engaging all generations, and guiding the community toward collaborative efforts. The Foundation embodies the Jewish values of service and generosity.

Since its founding in 1972, JCF has invested heavily in the health and vibrancy of the Greater Hartford Jewish community. The Foundation serves as a partner, educator and trusted advisor for individuals and families pursuing meaningful philanthropic impact while building a permanent pool of charitable dollars to secure the long-term future of the Jewish community. With \$125 million in assets under management, more than 1,300 individual charitable funds, and annual grants of \$4.5 million, JCF is among the largest foundations in Connecticut.

Through partnership and collaboration with other local organizations, the Foundation's focus today has been outward looking with an eye toward ways to strengthen the community, its donor base, and the philanthropic ecosystem.

The Foundation represents the vision of Jewish community leaders who have worked assiduously to make certain that long-term financial resources are available to the Greater Hartford Jewish community and that this community remains relevant and vital into the future. As an organization, JCF serves as a conduit between donors' charitable intentions and the critical needs of the community. The Foundation accomplishes this role by assisting donors in structuring charitable gifts, building legacies, facilitating personalized philanthropy, and distributing community grants to a broad range of programs and institutions.

JCF was originally created as the "Endowment Fund" of the Jewish Federation of Greater Hartford ("the Federation") with a \$50,000 allocation intended to support the Federation and its agencies by generating endowment and legacy gifts, responding to unforeseen needs and emergencies, and supporting special projects and new programs.

In 1993, as part of a comprehensive plan to build endowment and create greater flexibility in addressing the needs of the community, the Endowment Fund became an independent, self-supporting charitable entity. Known today as the Jewish Community Foundation of Greater Hartford, JCF models itself on other Jewish and non-sectarian community

foundations across the country.

Although it is an independent community foundation, JCF maintains a unique and strong relationship with the Federation. The two organizations work closely together and the CEOs collaborate on community needs to serve the region. This unique relationship is reflected by the fact that the Chair of the Federation's Board serves as ex-officio Trustee on the Foundation's Board and the Chair of the Foundation serves ex-officio on the Federation's Board and that the long-range planning committee is a joint committee of the two organizations.

Over the years, the Foundation has been a significant supporter of the Federation and the two institutions have worked together on a number of key initiatives. In particular, the Federation was a partner in the community wide endowment campaign, Aim Chai, as well as the JMAP community study. The Foundation was also the principal funder of the Federation's Jewish Leadership Academy, which is a comprehensive lay leadership development program available to leaders across the Jewish community of Greater Hartford.

Most recently, the Foundation and Federation jointly launched the Jewish Hartford Rapid Relief and Recovery Fund to meet the basic human needs of individuals and families, and to provide financial support to synagogues and agencies to help them maintain their vital services to our community.

Over the past several years, the Foundation has undertaken a number of innovative initiatives to address the changing nature of the Jewish community and its needs. It has positioned itself in an outward looking role and has successfully promoted community-wide dialogue and collaboration. Today, the Foundation serves not only as a strong financial institution, but as an organization that educates the growing community, builds philanthropy, and fosters a strong community agenda.

Beginning in 2012, JCF, in partnership with the Federation, launched the Aim Chai Endowment Campaign with the goal of raising significant new resources for the community. This was the first campaign of its kind in the country. The campaign embraced a unique collaborative model built around a centralized infrastructure that facilitated an active partnership with more than 28 Jewish community institutions throughout Greater Hartford to raise endowment funds, most of which will be held by JCF. The campaign concluded in 2017 and achieved its \$40 million goal.

In 2015, JCF created the new Center for Innovative Philanthropy ("the Center") whose mission is to strengthen the community's core philanthropic ecosystem. As part of the Center, the Foundation funded a comprehensive community study called JMAP that was designed to provide the data necessary to make more impactful decisions on community priorities as well as define the parameters of what constitutes a healthy, vibrant, and sustainable Jewish community. The JMAP results were published in 2019. Please see the JMAP study on pages

91-109.

Since then, the staff and Board of Trustees produced a strategic plan, in which much of the Center's activities were absorbed by various JCF staff. The strategic plan focuses on expanding our philanthropic fund development and grantmaking activities to meet the challenges of our ever-evolving community. Please see the strategic plan on pages 5-19.

In other areas of Foundation operations, JCF has begun to adopt an impact investing policy to ensure that all levels of impact are at the organization's disposal. In addition, JCF s for an extended (4 week or longer), immersive Israel travel experience for high school students. This program provides a custom designed pre- and post-trip educational program for recipients. The goal is to provide enough scholarships so that every student in the Greater Hartford area who wishes to attend such a program can do so.

The Foundation has also created and maintained an infrastructure with solid systems, policies, and procedures and the organization has grown from one full-time staff person at its founding to 11 empowered professional. It has also built a culture not only of innovation and thought leadership, but of collaboration and service to the community. JCF embraces the idea that asset growth is not the organization's mission, but rather a tool for strengthening the community it serves. Today the Foundation has earned an outstanding reputation and is recognized for its thought leadership, collaborative approach, accessibility, creativity, integrity, and fiscal responsibility.

Philanthropic Services

JCF currently manages more than 1,300 funds for individual, family, and foundation donors and as of June 30, 2019. Designated (33%) and donor advised funds (30%) comprise the largest proportion of the Foundation's assets, followed by unrestricted community funds (24%), and custodial funds (13%). The Foundation is sensitive to the philanthropic interests of its donors but also attempts to call attention to the importance of unrestricted giving.

In recent years, JCF has increasingly highlighted opportunities for legacy giving and the organization works directly with donors and with their professional advisors – including attorneys, accountants, and financial consultants – to provide counsel on charitable giving options. Such charitable options include unrestricted funds, donor advised funds, custodial funds, and designated funds, which incorporates individual, field of interest, and scholarship funds.

Grantmaking

Since its inception, the Foundation and its donors have made grants to charitable institutions in Greater Hartford, across the country, and around the world. In FY20, the Foundation awarded \$4.5 million in grants. These grants fund innovative projects, community-wide

initiatives, and a broad range of programs and institutions. Grants from unrestricted community funds are awarded through a competitive grant application process; grants from donor advised funds are made upon the recommendation of donors, after review and approval by the Foundation Board; and grants from designated funds are made automatically each year to fulfill the charitable interests for which the funds were originally created.

While JCF and its donors make grants to a myriad of organizations and programs, the Foundation's (and Federation's) four areas of grant-making priority have been for some time now: Jewish education, Jewish outreach and engagement, non-profit capacity building, and seniors and aging. These priorities were temporarily amended in March 2020 in favor of focusing on Covid-19 relief and recovery efforts.

Management and Governance

The Foundation has an annual operating budget of approximately \$1.7 million and an 11-person staff. Reporting directly to the CEO are the Vice President of Philanthropy, Vice President of Finance, Vice President of Grant Programs, Vice President of Operations and Donor Services, and the Marketing Director. Other staff includes a Development and Stewardship Officer, Finance and Gift Controller, Gift and Finance Associate, and two administrative support staff.

The Board of Trustees serves as the governing body of the Foundation. Board members are highly respected leaders in the Greater Hartford Jewish community and their expertise encompasses business, law, investment management, Jewish communal activity, and philanthropy. Trustees can serve a maximum of two consecutive three-year terms, and are eligible for re-election after a one-year hiatus. Board meetings take place five times a year and committee meetings are scheduled as needed. Current committees include: Audit, Budget and Finance, Grants, Investment, and Scholarship.

Financial Highlights

JCF is fiscally sound and well managed. The Foundation's assets are managed as a comingled investment pool and the investment portfolio is structured with the objective of achieving total investment return in excess of the grant spending policy, operating costs and inflation. The Foundation's Investment Committee, in conjunction with an outside professional consultant, establishes investment policy and monitors individual investment managers and their performance. As of June 2020, the Foundation reported total investment returns of 0.8%. The current spending rate is 5% of a fund's average fair market value over the preceding twenty quarters, with 4% available for grants and 1% used to cover the cost of operating the Foundation. Last year, JCF's expense to total asset ratio was 1.25%. For information about our annualized returns, please see page 54 for our Managed Portfolio Investment Performance Report as of June 30, 2020.



**JEWISH
COMMUNITY
FOUNDATION**
OF GREATER HARTFORD

**2020 - 2022
STRATEGIC PLAN**

Expanding Philanthropy and Impact

December 2019



Developed in partnership with Fio Partners, LLC

LETTER FROM LEADERSHIP

Thank you for your interest in the Jewish Community Foundation of Greater Hartford's 2020-2022 Strategic Plan, "Expanding Philanthropy and Impact," that will guide our organization's work for the next three years. This document combines equal measures of idealism and realism – attributes required for the Foundation and its community partners to succeed at achieving the shared goal of ensuring our vibrant Jewish future.

In an ever-evolving landscape in which technology advances, populations shift, and new societal and community concerns continue to emerge, the Jewish community finds itself facing new challenges every day. To address these challenges, the Foundation must do its part to provide more resources to the community by leveraging its core strengths and assisting our community partners to do the same.

To further increase our impact, we strongly believe that our primary focus must remain the effective cultivation of Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come. The Foundation further recognizes the critical nature of fostering deep, trusting relationships; we are committed to expanding these relationships across the region with donors and community leaders, synagogues and agencies, and with the people in our community who are very involved, to those we have yet to engage.

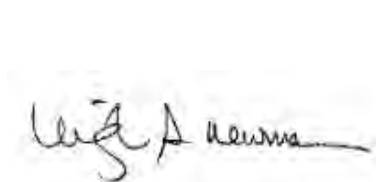
To achieve this, the Foundation will enhance its development capabilities and grant making activities, increase our visibility, deepen collaboration with the Jewish Federation and community partners, while creating exceptional learning opportunities for donors, organizations and community members. We will further build upon the dedication of our passionate staff and lay leadership to uphold and innovate, enhance our culture and operations, and evolve our board to align with the changing nature of our work.

We'd like to thank our Board of Trustees and the lay members of the strategic plan's "Design Team" – Merrill Mandell, Walter Harrison, Gayle Temkin and Gerald Goldberg – for all the time and counsel they provided throughout the process. We are also grateful to our senior staff – Michael Elfenbaum, Susan Lotreck, Kathryn Gonnerman, Rhona Morgan and Maureen O'Connell for their roles as Design Team members and for the many hours they invested in refining the plan. Thanks also go to the lay leaders, donors and professionals who shared their views and constructive feedback, and to the entire Foundation staff which remains intricately involved in the planning and execution of this plan. We are also indebted to Anne Yurasek and Fio Partners for their invaluable contributions in designing, researching and crafting this document, while making the work enjoyable.

This is an exciting time in our community's evolution – one that is rife with opportunity. We are blessed with a wonderful Jewish infrastructure in Greater Hartford and talented cadres of leadership -- both established and new -- who recognize the need for collaboration, investment and change -- and are willing to put in the work to expand our collective impact.

It is our privilege to join with these leaders, donors, professionals and the diverse members of our great community in our collective pursuit of *tikkun olam* and meaningful Jewish continuity – in perpetuity.

Let's continue to go from strength to strength,



Leigh Newman
Board Chair



Jacob Schreiber
President & CEO

OUR PROCESS

A Strategic Planning Committee, made up of members of the Board of Trustees and senior staff of the Foundation, was formed in March 2019 to develop a three-year strategic plan for the Foundation. The decision was made to engage a third-party consulting firm, Fio Partners, LLC (Fio) to provide guidance and pertinent experience to the effort.

Starting in April 2019, the Strategic Planning Design Team worked with Fio to design the information base needed to support the planning process. The Design Team and Fio gathered data from a variety of internal and external sources to help provide perspectives on our current state and trends which are likely to impact the future of the Greater Hartford Jewish Community and the work of the Foundation. The information gathering efforts included the following:

- Board of Trustees Survey
- Staff Climate Survey and Focus Group
- Historical Financial Analysis
- Focus Group with the *JewGood Hartford* Steering Committee
- Focus Group with the Grants Committee
- Community Stakeholder Interviews
- Interviews with Other Philanthropic Leaders (Jewish and secular Community Foundations)
- Compilation of Donor Perspectives and Reflections
- Center for Innovative Philanthropy (CIP) - Background and Recommendations Review
- Review Results of the 2016 JMAP Survey and 2019 JMAP Update

In late July 2019, the Board of Trustees and senior staff held a planning retreat. The results of the retreat informed the overall strategic direction reflected in the plan and provided input into suggested goals, strategies, and tactics.

Following the retreat, Fio worked with senior staff and the Design Team to reflect on the retreat results and develop the narrative plan document. The plan leverages Fio Partners' approach to nonprofit strategic management, which includes aligning leadership around mission, vision and values, designing or redesigning the primary work of the organization and its relational strategies (including fund development, marketing, and collaboration), strengthening management systems and supports, and strengthening methods to improve the organization.

The plan represents a proposed three-year scope of work and acts as the basis for the creation of the first, 18-month implementation plan, to be drafted by staff by the end of winter 2020. Proposed strategies and tactics for this first phase are denoted in bold throughout the plan. The plan also includes proposed areas of key measurements so that leadership can monitor implementation and track progress.

The plan was approved unanimously by the Foundation's Board of Trustees at its December 19, 2019 Board meeting.

WHAT WE LEARNED

The information base gathering effort yielded a range of themes that helped to inform the future strategic direction of the Foundation.

Viewed as a Credible, Trusted Partner: The Jewish Community Foundation of Greater Hartford is viewed as a credible, trusted, neutral partner by key stakeholders. Through its leadership and success with the Aim Chai campaign, the grantmaking support provided to community organizations, and capacity building efforts and resources, stakeholders noted the organization's investments in the community and its steadfast commitment to preserving and supporting the Greater Hartford Jewish community. Community stakeholders expressed an interest in continuing to see the Foundation provide forward-looking, future-focused leadership around the evolution of the Jewish community.

Shifting Community Trends: Both internal and external stakeholders noted the shifting perspectives of the younger generation and the need for greater engagement of younger generations in the Jewish community, in synagogues, and in philanthropy. In addition, stakeholders noted the aging demographics and the deep concern that future volunteer leadership of community institutions is challenging to find and the commitment to supporting those institutions could decline in the future. The increased need for services to seniors was also noted. The two other substantive issues are the state of Jewish education in the community and concerns about its sustainability, as well as the need for re-invention. Stakeholders also expressed concern about the future of synagogues and the role of synagogues in the community in the future.

Clarification of the Role of the Foundation in the Community: Voices across the information base referenced a lack of clarity as to the roles of the Federation and the Foundation in the community. Some viewed the Foundation as responsible for ensuring the future well-being of both institutions and the community as a whole, while the Federation is responsible for bolstering the current status and needs of community institutions and the community. This was expressed a few times as "The Federation is the community checking account, and the Foundation is the savings account." Stakeholders noted the Foundation's role in spurring innovation, making significant investments in projects intended to have broad community impact, and strengthening community institutions through its grantmaking. The Federation was viewed as one of the programming arms of the community, while the Foundation was viewed as helping institutions ensure future sustainability. There were additional calls for collaboration and alignment between the two entities. Community stakeholders also noted the need for continued work around institutional capacity building.

Evolution of the Organization: Two key themes emerged out of the internal assessment efforts - the first, was the opportunity to address issues related to staff morale and team building. The second was the opportunity to strengthen engagement and committee functioning for the Board of Trustees. Across both internal and external perspectives, there was a call to action to the Foundation to share more about the considerable impact of its grant making and consulting, to spur more philanthropic investment in the Foundation and in the community, and to share more about its processes and decision-making.

Shifts in Philanthropy: Stakeholders and field leaders noted the speed at which philanthropy is evolving and donor expectations are shifting. The field leaders noted how the focus is shifting from "asks" to

educating, informing, and convening donors. From small donor convenings to roundtables to immersive experiences, leaders noted the need to help donors be more aware of community issues and what foundations are doing to invest resources in the community. The other major observation was the recognition of the competition in the market for donor advised funds. Given the low barrier to entry and lower fees at large financial institutions, foundation leaders noted the need to compete by delivering personalized service, offering deep expertise, and creating a community of philanthropists. In addition, to engage younger donors, stakeholders suggested increasing the use of social media and communications (sharing more stories of the impact of Foundation community investments), providing more volunteer events, more family-friendly events and opportunities, and opportunities for input and donor engagement.

OUR MISSION, VISION, AND VALUES

OUR MISSION

The Jewish Community Foundation of Greater Hartford unlocks the transformative power of personalized and collective philanthropy to solve problems, strengthen community organizations, and provide permanent support for our Jewish community.

OUR VISION FOR OUR COMMUNITY

Jewish. Community. Forever.

Jewish. We reflect the community we serve and are guided by the Jewish values of *tikkun olam* (repairing the world), *tzedakah* (caring for those in need), and *tzedek* (pursuing justice).

Community. We believe in the power of every individual to make a difference and that together we can change the world. We envision a vibrant, diverse, inspired Jewish community in which all are valued, engaged and supported.

Forever. We are forward thinking, focused on impact, and always seeking dynamic opportunities that position our community to thrive for generations to come.

OUR VALUES

Collaboration (*Shituf P'ulah*) – We partner as a team to solve problems and to celebrate achievements.

Accountability (*Areivut*) – We are responsible to each other and for one another.

Respect (*Derekh Eretz*)– We act with integrity and treat everyone the way we would want to be treated.

Self-Reflection (*Cheshbon Nefesh*) – We are open to constructive feedback and always willing to learn.

OUR VISION FOR OUR ORGANIZATION

- The Foundation is a catalyst for encouraging the thoughtful, effective evolution of our community.
- We are known for our creative, proactive efforts that yield high-impact results and strengthen organizations, and for providing a superior donor experience.
- We will inspire philanthropy and strengthen endowments for our community institutions. We will act as responsible stewards for our investments and create new ways to invest in our community.
- We are viewed as a trusted partner by individuals and organizations who have a deep commitment to our community. We will seek complementary partnerships, both with our Federation and our community partners, to enact our shared aspirations for our community.
- The Foundation staff is a high-functioning team with diverse expertise. Each team member has opportunities for personal growth and contribution.
- Our Trustees are active, engaged ambassadors who promote the interests of our organization, help foster meaningful donor relationships, oversee the management of our assets and provide leadership for all our efforts across the community.

OUR 2020 - 2022 GOALS

Goal 1: Increase Our Impact

The Jewish Community Foundation of Greater Hartford defines its core activity as cultivating Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come.

To achieve this, the Foundation will strengthen its efforts by further systemizing development and relationship building activities, enhancing grant making, leveraging our key influencers and piloting different approaches to expand our reach, and by creating unique learning opportunities for donors, organizations, and community members.

Goal 2: Utilize Marketing as a Strategic Tool to Bolster the Visibility and Objectives of the Foundation

The Foundation will clarify and promote its personalized philanthropic services and the important roles it plays in providing immediate and long-term support for the Jewish community and beyond.

Goal 3: Evolve Our Infrastructure

With the increased expectations of donors and the Foundation's interest in providing high-quality donor supports, the staff have recognized the opportunity to strengthen our internal systems, improve efforts to work across internal functions, and learn from our work.

Goal 4: Evolve Our Board of Trustees

Our Board of Trustees will actively strengthen the activities of the Foundation by fine-tuning its processes, providing strategic direction and acting as ambassadors to support the philanthropic work of the Foundation.

OUR 2020 - 2022 GOALS AND SUPPORTING STRATEGIES AND TACTICS

GOAL 1: INCREASE OUR IMPACT

The Jewish Community Foundation of Greater Hartford defines its core activity as cultivating Jewish philanthropy, which inspires donors to invest in the organizations and causes they hold dear -- and leave charitable legacies that guarantee meaningful, joyful Jewish life for generations to come. To achieve this, the Foundation will strengthen its efforts by further systematizing its development and relationship building activities, enhancing grant making, leveraging our key influencers and piloting different approaches to expand our reach, and by creating unique learning opportunities for donors, organizations, and community members.

STRATEGY A: Cultivate philanthropic and legacy giving through a range of individual and collective options

Proposed Tactics and Suggested Activities:

- **Systematize our approach to stewardship and donor cultivation that includes moves management goals/metrics such as the number of touches, visits, donor discoveries and solicitations**
 - **Focus on strengthening relationships and the overall donor experience with current donors**
 - **Undertake analysis of current Foundation relationships, seeking to understand where the Foundation has strong relationships and where gaps may exist across the community, and create a cultivation strategy**
 - Current donors
 - Geographic lens
 - Demographic lens
 - Presence in community institutions/organizations

- Strengthen joint efforts with Jewish agencies and synagogues around identifying, developing and stewarding their current and potential endowment/legacy donors
- **Leverage the Foundation's key influencers by:**
 - **Enhancing the role of Trustees to support the philanthropic efforts of the Foundation (e.g., sharing our story, donor stewardship, education and cultivation)**
 - Reconstitute the Development Committee to help staff with donor cultivation activities
 - Capitalize on the strengths of each Trustee to contribute to these efforts
 - Rebuild our relationships with cadre of financial advisors, accountants and attorneys to foster their proclivity for sharing information about the Foundation with their clients
 - Create and begin executing on a plan of action
 - Consider offering a program for continuing education credits
- **Provide unique learning experiences by:**
 - **Continuing to cultivate our current giving circles (JewGood and Lillian Fund)**
 - **Establishing criteria/assessment for success and develop annual work plans**
 - Creating opportunities to see "philanthropy in action" – sharing the impact of investments for current and future donors, such as immersive experiences and site visits
- Explore new approaches to increase our portfolio of donor advised funds
- Piloting approaches to engage the next generation of donors (e.g., explore creating incentives, such as matching fund opportunities, working to eliminate barriers to giving, concentrating on multigenerational family education)

STRATEGY B: Continue to invest in strengthening the capacity and effectiveness of our community institutions through expanding strategic grantmaking

Proposed Tactics and Suggested Activities:

- **Prioritize trust-based relationships and ongoing listening with organizations to inform our work and identify needs**
- **Re-examine the eligibility and outcomes criteria for the Community Grants Program to elicit a wider range of new ideas and expand the populations we serve**
 - **Pilot including synagogues and locally focused programs from national Jewish organizations**
 - **Consider expanding capacity-building funding to include critical infrastructure and consulting needs**
 - **Invest more time at Board meetings to review grants and impact**

- **Continue the Foundation's commitment to proactively identify and support high impact Jewish engagement programs**
- **Expand opportunities to link organizational needs with donor interests (organization wish-lists, short-term and long-term needs)**
- Work with community partners to identify and fund emerging community-wide projects to address community challenges/opportunities

STRATEGY C: Develop partnerships and new approaches to create positive community impact¹

Proposed Tactics and Suggested Activities:

- **Engage in a formal, facilitated process with the Federation to further foster/institutionalize collaborative efforts that better define and maximize our distinct and collaborative roles in strengthening Jewish community**
 - **Items for discussion may include collaborative efforts on financial resource development, planning, marketing/messaging, grant making, etc.**
 - Promote the outcomes of this process by:
 - Working with the Federation to create messages that complement each other's work and clarifies each organization's unique roles
 - Developing a communication influencer plan to gain support from Foundation and Federation board leaders and other community influencers
 - Holding public forums (Conversations with CEOs) to discuss items impacting the Jewish community and how the Foundation and the Federation will approach these issues
- **Determine whether to continue the JMAP project**
- Collaborate with community partners to support collective problem solving across silos; serve as a neutral convener, where appropriate
- Explore opportunities for new models of investing in the community (e.g., impact investing, impact funds for transformative projects)
- Establish Foundation matching grants to organizations to spur fund development and to strengthen endowment giving
- Offer best practices/resources related to fund development and philanthropy

¹ Note: Our ability and timelines for achieving these will likely become clearer after our collaboration discussions with Federation.

GOAL 2: UTILIZE MARKETING AS A STRATEGIC TOOL TO BOLSTER THE VISIBILITY AND PRIMARY OBJECTIVES OF THE FOUNDATION

The Foundation will clarify and promote its personalized philanthropic services and the important roles it plays in providing immediate and long-term support for the Jewish community and beyond.

STRATEGY A: Clarify our distinctive role in cultivating philanthropy

Proposed Tactics and Suggested Activities:

- **Create annual marketing plans to guide our work**
 - Establish an overall calendar of communications and media outreach efforts (ensuring digital media activities, regular email, social media communication and traditional media engagement)
 - Measure qualitative and quantitative results
- Create time-limited campaigns with defined success metrics and clear calls to action (e.g., year-end, product specific, interest area specific)
- **Strengthen and simplify our overall messaging strategy**
 - Create clear messages (elevator pitch) on Foundation's mission, purpose and differentiators
 - Segment audiences and develop distinct messages for each audience profile
 - Produce messaging toolkits for Foundation key influencers, including Trustees

STRATEGY B: Enhance visibility and understanding of our services and impact

Proposed Tactics and Suggested Activities:

- **Support development activities to cultivate new donors**
 - **Create donor cultivation collateral including prospect and welcome kits**
 - Profile and publicize donors who are deepening their philanthropy through the Foundation
 - Market products specific to donor life events (e.g., Simcha Funds, B'nai Mitzvah Funds, Memorial Funds)
- Produce multimedia content that will elevate community voices and allow the community to explore issues in new and different ways
 - **Convert website into an interactive story-telling and donor education portal**
 - **Create traditional media briefing opportunities surrounding story leads and deepen relationships with key media contacts**
 - **Produce video interviews with donors, board members and scholarship recipients**
 - Launch a new podcast series

GOAL 3: EVOLVE OUR INFRASTRUCTURE

With the increased expectations of donors and the Foundation's interest in providing high-quality donor support, the Foundation must strengthen its internal systems and improve efforts to work across internal functions.

STRATEGY A: Transform our information management systems

Proposed Tactics and Suggested Activities:

- **Develop organization-wide information management plan**
 - Identify all the organizational elements that are supported by data collection, analysis and reporting
 - Review for continuing relevance and effectiveness from the perspective of the decision makers who use the information and from the perspective of line staff who interact with the system
 - Identify any areas needing improvement or upgrading, e.g., CRM system
 - Involve software and hardware vendors at the point when organization needs are clear
- Acquire a new fund accounting management system, which may also involve updating other major management systems, including financial management and donor services/reporting
 - **Evaluate different information management systems to identify best fit for our needs**
 - Consider integrated systems that would include customer relationship management
 - Select and implement new system
 - Revise all policies and procedures, as needed, based on system selected
 - Review and update job descriptions, aligned with system requirements and procedures
- Implement cloud-based document management to keep up with trends in information management

STRATEGY B: Strengthen our human resources and organizational development systems and supports

Proposed Tactics and Suggested Activities:

- **Assess human resource support needs and consider how best to bring those supports into the organization (assessment, need identification, hire/outsource)**
- **Monitor team effectiveness supports (huddles, staff meetings, retreats, trainings) and promote open dialogue on status/progress**
- **Develop a system for cross-training staff to be able to provide backup on key function areas**

- Review and enhance performance management supports, goal setting and individual professional development plans
- Offer trainings to staff throughout the year on key organizational topics (e.g., management and supervision, giving and receiving feedback, team effectiveness)

STRATEGY C: Develop approaches to learn from our work and reflect on our progress

Proposed Tactics and Suggested Activities:

- **Reflect on bi-annual grantee reports and discuss the implications of findings with Grants Committee and Trustees, periodically**
- **Evaluate and enhance the management dashboard**
- Develop approaches to garner feedback from fund holders and agency leadership on a regular basis and ensure findings are synthesized for implications for the work of the Foundation (create ongoing feedback loops)

STRATEGY D: Strengthen financial management systems and supports

Proposed Tactics and Suggested Activities:

- **Develop key result areas for financial health, with agreement of Board of Trustees for key targets**
- **Develop succession planning approach for financial function leadership**
 - **Continue cross-training key staff to ensure back-up support**
 - **Document/update key process documents, prior to implementation of new system**

GOAL 4: EVOLVE OUR BOARD OF TRUSTEES

Our Board of Trustees will actively strengthen the activities of the Foundation by fine-tuning its processes, providing strategic direction, and acting as ambassadors to support the philanthropic work of the Foundation.

STRATEGY A: Enhance Board functioning, engagement and involvement

Proposed Tactics and Suggested Activities:

- **Develop annual goals for the Board of Trustees as a whole, linked to the strategic plan**
(examples could include goals related to Trustee engagement and education, committee participation, monitoring of strategic plan implementation)
- **Review key governance documents which support Board functioning and ensure currency and application** *(role descriptions, expectations, Board policies)*
- **Strengthen committee functioning through review of committee charters, leadership, and membership**
 - Develop training for committee/on-boarding chairs to discuss best practice approaches for committee meetings/experiences
- **Support Trustees in selecting approaches to increase their individual engagement and contribution to the Board**
- Review Board meeting agendas and ensure opportunities for staff reports, more open dialogue on important topics and critical issues, and learning opportunities
- Conduct Trustee exit interviews

STRATEGY B: Fine-Tune Trustee recruitment and succession

Proposed Tactics and Suggested Activities:

- **Develop revised skills and experience matrix for current Trustees and identify gaps/priorities for recruitment, aligned with strategic plan aspirations**
 - Encourage Board members to continue to engage qualified people to replace them
 - Utilize committees as methods to introduce Board service to potential Trustee candidates
- **Review Trustee recruitment processes**
 - **Strengthen approaches to Board leadership succession planning efforts, seek ways to capture institutional and community knowledge**

MONITORING OUR PROGRESS

The Strategic Plan is a living document that is a road map by which the CEO and Board of Trustees should be held accountable. The plan should be utilized to create annual goals for the CEO/organization and for the Board of Trustees. Progress against annual goals can be monitored by ensuring regular updates on plan progress at Board of Trustees meetings and consistent reporting on desired key results, as noted below.

In addition, a detailed implementation plan will be used to track progress against the selected strategies and tactics for the first year and then updated accordingly for each successive year.

KEY RESULTS

The implementation of the Strategic Plan is envisioned to enact a set of measurable key results. For each goal, the table below outlines proposed key areas of measurement. It is envisioned that a dashboard of key results would be created to track progress and be reported to the Board of Trustees periodically throughout implementation.

Goal	Proposed Key Areas of Measurement <i>(with example metrics)</i>
Goal 1: Increase Our Impact	<ul style="list-style-type: none"> • Key selected stewardship metrics (process indicators) <ul style="list-style-type: none"> ○ Referrals (Board, nonprofits, others) ○ Visits, meetings, touchpoints • Engage at least 20 professional advisors, attorneys, and accountants through one-on-one meetings and learning opportunities; ensure methods in place to track referrals from this group • Number of giving circle members • Number and value of capacity building and engagement program grants made (organizations, synagogues) • Number and value of donations released from donor advised funds for specific organizational needs (community wish list, staff referral) • Results of stewardship efforts <ul style="list-style-type: none"> ○ Number and value of new endowment funds ○ Number and value of new custodial funds ○ New Donors >\$5000 ○ Number of Gifts > \$5000 ○ Bequests – As a of total donations % ○ Bequests - # of Legal Transfer Gifts ○ Bequests – Values of Bequests ○ Legacy Commitments - # of commitments

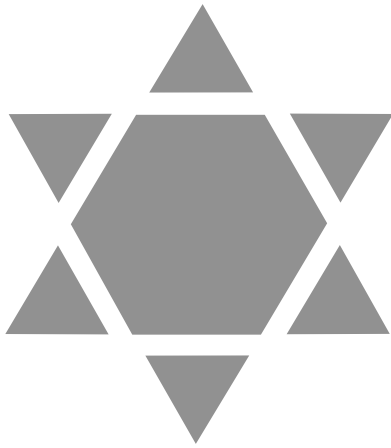
Goal	Proposed Key Areas of Measurement <i>(with example metrics)</i>
Goal 2: Utilizing Marketing	<ul style="list-style-type: none"> • Social media including Page Likes, Post Engagement • Email marketing including Average Open Rate • Media placements (earned, owned and paid) • Results achieved through marketing campaigns
Goal 3: Evolve Our Infrastructure	<ul style="list-style-type: none"> • Systems evolution metrics as determined • Number of staff trainings offered and attended (internal and external) • Staff climate survey results (conducted half-way through the plan cycle) • Selected key financial results
Goal 4: Evolve Our Board of Trustees	<ul style="list-style-type: none"> • Engagement (whole and committee level) • Progress on goals (based on self-assessment and annual goals) • Recruitment and on-boarding



**JEWISH
COMMUNITY
FOUNDATION**
OF GREATER HARTFORD

MANIFESTING OUR IDENTITY

In developing the new identity for the Jewish Community Foundation of Greater Hartford, we intentionally used 6 components to reference connectivity, preparation, the six directions, and most importantly, completion.

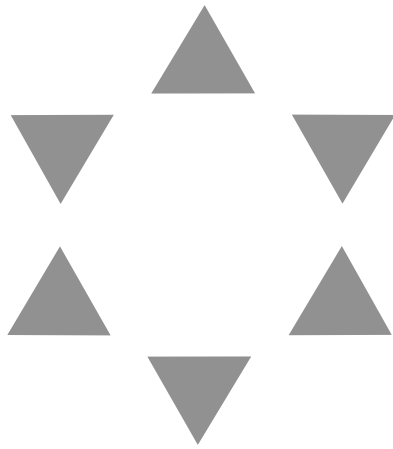


1. SHIELD OF DAVID

This symbol runs deeply throughout Jewish history and culture. In contemporary uses, while on the flag of Israel, it also stands as a gift to the world of the enduring qualities of an identity grounded in strong values. The Shield of David, *Magen David*, is a symbol of intentionality, wisdom, and insight. In the context of our identity, it holds a significant place at the nexus of our logo.

MANIFESTING OUR IDENTITY

In developing the new identity for the Jewish Community Foundation of Greater Hartford, we intentionally used 6 components to reference connectivity, preparation, the six directions, and most importantly, completion.



2. THE WORK AT THE CENTER

At the center of our logo is an open space representing the work ahead of us—the completion of community, and the humility with which we recognize our work must be done. In the center, is the vessel that we will fill.

MANIFESTING OUR IDENTITY

In developing the new identity for the Jewish Community Foundation of Greater Hartford, we intentionally used 6 components to reference connectivity, preparation, the six directions, and most importantly, completion.



3. MOSAIC

We are using the symbol of the mosaic as a reflection on ancient law—a reference to governance and the code of virtues by which we live. It's a guide to enlightenment, justice, and how we come together harmoniously. The 12 tiles of the mosaic represent the 12 tribes of Israel and through that reference, it represents the various components of the modern Jewish community. We are of different generations and approaches to practice. We may have differing priorities and approaches to problem-solving and we don't all experience community the same way. But we fit together. And though our individuality is something to celebrate, so is the acknowledgment that there is more that holds us together than separates us. We are stronger together.

MANIFESTING OUR IDENTITY

In developing the new identity for the Jewish Community Foundation of Greater Hartford, we intentionally used 6 components to reference connectivity, preparation, the six directions, and most importantly, completion.



4. FORWARD MOTION

The Shield of David and the Mosaic are interconnected in our identity as their symbolic meanings overlap and are intertwined. The fourth part of our identity is the orientation of these symbols. We have taken the liberty to shift from the vertical orientation, to embolden the symbols with a forward lean. Our mark is reverent of our rich history, while moving intentionally into the future of our culture and community.

MANIFESTING OUR IDENTITY

In developing the new identity for the Jewish Community Foundation of Greater Hartford, we intentionally used 6 components to reference connectivity, preparation, the six directions, and most importantly, completion.

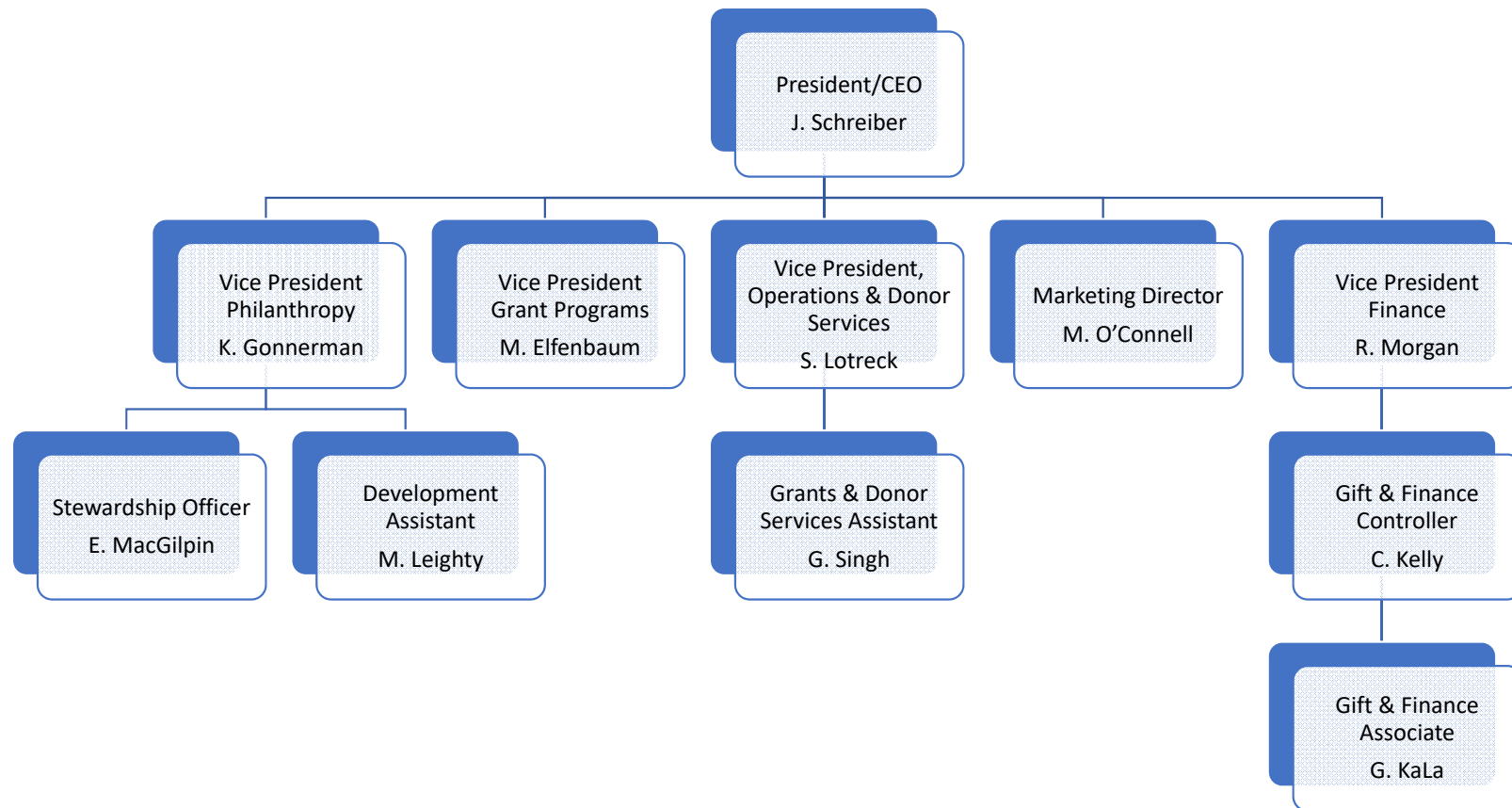


5. COLOR

Our colors are rooted in the history of our organization with a variant of green at the center. We adjusted the green as a nod to the basic color found in the turquoise hue when mixed with the blue-purple color of our identity. These are the rich *Tekhelet* colors—steeped in tradition and meaning, while maintaining a vibrant modern personality. Our colors symbolize how we hold on to our history and bring it forward in a renewed, purposeful way.



Organizational Chart





Staff Contact List



Jacob Schreiber- President and CEO
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Goldy Singh- Grants & Donor Services Assistant
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Madison Leighty- Development Assistant
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Mleighty@jcfhartford.org

Funds to fit your giving goals

Foundation Funds

There are many ways to have an impact through the Jewish Community Foundation. Establish a charitable fund that supports the causes you care about. Identify your charitable objectives and decide how involved you want to be.

Type of Fund	How it works
Unrestricted Community Funds	Funds innovation, emergency needs and long-term solutions to challenges facing the community. Your gifts enable the Foundation to award grants where they are most needed in the community.
Donor Advised Funds	Affords flexibility to support your favorite causes on your time schedule and receive favorable tax benefits. Recommend grants to the organizations and charitable causes you care about. Involve your family in a meaningful giving experience.
Scholarship Funds	Awards scholarships to deserving recipients. Provide financial assistance to students in the pursuit of their educational goals and learning experiences.
Designated Funds	Endow your support of a favorite charity or charitable cause. Distributes funds each year for a specific charitable use.
Collective Funds Giving Circles	Make decisions as a group about funding choices. Pool your resources with others; learn about critical community needs and decide where charitable dollars will have the greatest impact.
Legacy Funds	Create a future gift to the Jewish community through your will, trust or planned gift. Pass on your values to your family and loved ones and leave a lasting impact on the community.

The Jewish Community Foundation staff is available to consult with you on a confidential basis, please call us at **860.523.7460**.



The Jewish Community Foundation helps donors positively impact the community. Donors decide what, how and when they want to give to create their personal legacies - for now and the future.



COMMUNITY GRANTS PROGRAM GUIDELINES

The Jewish Community Foundation's Community Grants Program aims at improving the health and well-being of our Jewish community by funding programs and projects that address priority needs and will have an important, positive impact in the community. In awarding grants, the Foundation seeks to support projects that provide benefits that are likely to endure beyond the period of Foundation funding.

The Jewish Community Foundation is most interested in considering grant requests from organizations located in the Greater Hartford area and local projects that have Jewish content. The Foundation will consider grants to charitable organizations not serving exclusively Jewish needs when appropriate to alleviate extraordinary community problems or to address public issues of special concern to the Jewish community.

Foundation grants are made only to organizations that are described in Section 501(c)(3) of the Internal Revenue Code and have been classified as public charities.

Please note that the Foundation is generally unable to fund all the requests submitted for consideration.

PURPOSES FOR WHICH FUNDS ARE GRANTED

At this time, only the Jewish Federation of Greater Hartford and its beneficiary agencies are eligible to apply for Community Grants unless prior approval from the Foundation is received.

Community Grants may be made for:

- 1) **New Initiatives** - Based upon established strategic priorities, the Foundation will from time to time circulate a Request for Proposals (RFP) to create or initiate programs that will have a transformative and positive effect on the Greater Hartford Jewish Community. Collaboration is strongly encouraged.
- 2) **Seed Funding** - The Foundation may provide funds to start, establish or initiate a new program or pilot project that is innovative in purpose and does not commit the Jewish Community Foundation to sustaining support. Seed Funding grants are renewable up to a total of three years (typically up to \$50,000 in total).

The new program must be one that adapts to demographic shifts or addresses evolving constituent needs, changing strategic goals or other external circumstances and fits with the community's funding priorities.

- 3) **Capacity Building** - Support to strengthen the governance, operations and finances of an organization. These may include grants for the use of consultant services directed towards activities such as strategic planning, board-staff relations, fund development planning, financial planning, marketing, public relations/communication planning, corporate planning, technology planning or organizational needs assessment (typically \$10,000 - \$30,000).

Capacity Building grants are available in first priority to the Jewish Federation of Greater Hartford and Federation beneficiary agencies that do not otherwise qualify for grants for technical assistance, financial management assistance, organizational assessments, or automation support through Hartford Foundation for Public Giving programs.

Other grant programs:

- 1) **One-time event/program** – These programs should have strong Jewish content, foster collaboration among organizations, encourage public participation of a wide-ranging constituency and/or have strategic value to the grantee organization (typically up to \$10,000).
- 2) **Community Building Grants** – Greater Hartford area synagogues are eligible for one grant of up to \$2,000 per institution per fiscal year. Grants can cover a wide range of initiatives including (but not limited to) educational initiatives, leadership development and congregational programs.

COMMUNITY GRANTS WILL NOT BE AWARDED FOR:

- Ongoing operating expenses (i.e. salaries of existing staff and overhead)
- Annual fundraising campaigns
- Endowments
- Scholarships
- Existing obligations, or to replenish other sources used to pay for such obligations
- Equipment, unless it is a peripheral cost and integral to accomplishing a project/program (*please contact the Foundation regarding Capital Equipment grants*)
- Duplication of existing programs or services

FUNDING PRINCIPLES

The Foundation will give weight to requests as follows:

- 1) Falls within one or more Foundation strategic priority areas:
 - Jewish Learning
 - Seniors and Aging
 - Capacity Building
 - Outreach

- 2) Provide substantial long-term benefit. The Foundation focuses its resources on projects that produce significant benefits that are likely to endure beyond the period of Foundation funding.
- 3) Leverage other funding. The Foundation grants requests for matching funds and for projects that leverage, or maximize, the effect of the Foundation's grant by bringing together various resources to meet project goals in new and creative ways.

CRITERIA FOR EVALUATING GRANT APPLICATIONS

The following general criteria will be used in evaluating grant applications:

- The applicant has the capacity to accomplish the proposed project and the project is clearly within its mission.
- The project is well planned and feasible.
- The project proposal has clearly defined and measurable outcomes.
- The project does not duplicate existing services within the Jewish community.
- There is sufficient existing or potential demand in the community to justify the resources designated for the project.
- For new programs and program enhancement support, the program/service adapts to demographic shifts, evolving constituent needs, changing strategic organizational goals or other external circumstances.
- The proposed project furthers Jewish values, ethics and purpose.
- There is a strong likelihood that the project will continue beyond the period of Foundation funding.
- The proposed project will have a meaningful positive impact on the Jewish community of Greater Hartford.
- The applicant has demonstrated that the proposed project addresses an identified priority need of the community.

HOW TO APPLY FOR A GRANT

STEP 1: PROPOSAL

The Foundation accepts grant proposals on a rolling basis. The Foundation's Grants Committee typically meets four to five times during the year. Application deadlines are *around* August 1, November 1, January 1, March 1 and May 1 (please contact the Foundation for exact due dates). A typical grant cycle will take 3-6 months to complete.

Only one (1) proposal per organization will be accepted during any given grants cycle.

To apply for a Community Grant, an organization must contact Foundation staff to ensure the proposed project or program falls within established guidelines, regardless of the

amount requested. Foundation staff will work with you determine if a full grant application is appropriate.

STEP 2: GRANT APPLICATION SUBMISSION (BY INVITATION ONLY)

We accept applications only from organizations that are invited to apply. Organizations invited to submit full grant applications will be given the application for completion.

STEP 3: REVIEW AND EVALUATION OF FULL GRANT APPLICATIONS

The Grants Committee will review and evaluate completed grant applications and forward its recommendations to the Board of Trustees. We may conduct site visits and/or invite the organization's staff and lay leadership to meet with the Committee to better understand the proposed effort.

STEP 4: GRANT DECISIONS

The Board of Trustees makes all final decisions on grant requests. Foundation staff will notify organizations of grant decisions soon after each board meeting. Grantee organizations must sign grant agreements in order to receive grant funds.

For more information, please contact the Foundation, 860-523-7460 or grants@jcfhartford.org.

Capacity Building Grants Guidelines

Background

In addition to educational opportunities, the Jewish Community Foundation and the Center for Innovative Philanthropy offer capacity building grants to help our nonprofit partners strengthen their management and leadership so they can serve the community more effectively. Capacity building is the practice of investing in an organization's infrastructure to increase its *ability* to achieve its mission, creating more resiliency and long-term sustainability for the organization.

Organizations generally use such grants to engage experts (coaches, consultants, etc.) to help board and staff accomplish work that requires time, energy, expertise, and innovative thinking beyond everyday operations.

The Foundation's capacity building grants help organizations:

- Strengthen executive and board leadership
- Engage in organizational planning and impact assessment
- Improve financial management and operational efficiency

These grants have proven especially beneficial to groups experiencing significant organizational transitions such as major shifts in funding sources, the departure of a founder or CEO, or rapid growth.

Other areas of critical need for capacity building may be considered on a situational basis.

Capacity Building grants typically range from \$10,000-\$30,000 but will be reviewed on an individual basis.

Eligibility

Funding for capacity building grants is limited, and not every request can be funded. If you are considering a number of different ideas, we are happy to discuss them all and help you to determine what would be the best fit. A general rule of thumb, however, is to submit a grant for your highest priority project that will help your organization to overcome a significant obstacle and position itself for better performance and impact.

Think of a capacity building grant as a springboard to a new level of efficiency or impact. A key to successful grant applications is the ability to communicate the change you expect to see as a result of execution of your capacity building project.

In addition, an organizational assessment conducted by an expert and funded by the Foundation may help to further identify priorities and how to begin to address a key capacity of the organization.

The Foundation will consider capacity building proposals that demonstrate:

- Board and staff consensus that capacity building support is needed, and that the proposal being put forth is a priority for the organization
- Board and staff commitment to investing the time and human resources needed to execute the project, embed the learning, and act to implement over a long term. (In many cases, the new capacity requires continued investment beyond the specific term of the grant, as when a strategic plan requires constant review, assessment and adjustments to plans and implementation.)
- Clear definition of the specific ways in which the organization will be stronger and more sustainable as a result of the grant
- Evidence that the grant will contribute to long-term organizational effectiveness rather than serving as a short-term band-aid solution
- Capacity and willingness of the organization to implement recommendations that result from this assistance

It is probably not appropriate to apply for a capacity building grant if:

- Your need is not within one of the three priority issue areas of executive and board leadership, planning and assessment, or financial management and operational effectiveness
- Board and staff do not agree that outside management assistance is needed
- Your real need is the addition of a permanent staff position to resolve a management problem or need
- Your organization is in crisis and needs emergency operating funds
- You are seeking support for a fundraising campaign
- You are seeking support for ongoing general operations, including development, communications and marketing support
- Your request is for a conference or special event
- You need an audit and have not budgeted for it (an audit is an ongoing operational expense and therefore not part of the capacity building program)

Note: The reasons noted above apply to capacity building grants only. In some cases, the Foundation may award grants for purposes noted above as part of other grantmaking functions of the Foundation.

Funding

In general, the Foundation's philosophy for effective grantmaking includes the belief that the most effective grants involve the grantee having a financial stake in the proposed project. The following is a general outline of when funding other than from the Foundation is required and when, in certain circumstances, the Foundation will consider full funding.

Funding from other sources required:

- Marketing and Development
- Governance and Board Development
- Financial controls, operations and/or sustainability

Fully funded by the Foundation (considered on a case by case basis)

- Major strategic planning in cases where the grantee has never developed a strategic plan and/or the grantee's operating budget is such that it cannot assume all or part this expenditure. The same criteria hold in cases where the grantee has not created or updated a strategic plan in a significant amount of time.
- Major Transitional change and the grantee's operating budget is such that it cannot assume all or part of this expenditure.

We recommend that you contact the Foundation for clarification on whether your proposed Capacity Building grant would be considered for partial or full funding.

Special Covid-19 Community Grants Program Guidelines for FY2021

The Jewish Community Foundation's Community Grants Program aims at improving the vibrancy and well-being of our Jewish community by funding programs and projects that address priority needs and will have an important, positive impact in the community.

As our community, like all others, faces a changing and challenging landscape due to COVID-19, the Foundation Board adopted in April 2020 the emergency practice of employing the funds available in our Community Grants Program to exclusively address the effects of COVID-19.

Projecting that the effects of COVID-19 will cause further hardship into the coming fiscal year, the Foundation Board voted on June 18, 2020 to continue its aforementioned emergency practice by suspending the Foundation's regular Community Grants Program and adopting new guidelines, below, for the "Special Covid-19 Community Grants Program for FY2021" to focus on funding extraordinary Jewish community needs, *caused exclusively by COVID-19*.

These funds will provide support to ensure basic needs are met, and to bolster the ability of community organizations to continue providing programs and services that are essential to the fabric and future of our community.

PURPOSES FOR WHICH FUNDS ARE GRANTED

- 1) **Humanitarian Aid** – During this time, we recognize that additional humanitarian aid may be required to ensure that the basic needs of our Jewish community members are met. If an organization has experienced a *significant* increase in the need for humanitarian aid and/or needs to expand or initiate a new program to address basic human needs in direct response to COVID-19, the Foundation may support these efforts.
- 2) **Innovation and Efficiency**– Every crisis breeds opportunity for positive change. COVID-19 is indeed changing the way we live – demanding we seek new ways to deliver programs and services in a more relevant, efficient, collaborative and cost-effective manner. The Foundation will prioritize funding innovative approaches that address new ways to educate, heal, celebrate, recreate and provide other essential programs and services to our community in collaborative ways that cut duplication, save communal funds and promote sectarian partnerships.
- 3) **Organizational Stabilization** – The health and continued vibrancy of our organizations are critical. The Foundation will consider applications from organizations impacted *directly by COVID-19* and require assistance to stabilize their operations in order to

continue providing essential scholarships, services and programs that address community priorities. The Foundation will take into account the overall financial health of an organization when considering these proposals.

COMMUNITY GRANTS WILL *NOT* BE AWARDED FOR:

- Annual fundraising campaigns
- Endowments
- Equipment, unless it is critical to *directly providing* essential services
- Duplication of existing programs or services
- Addressing underlying budgetary crises that existed before Covid-19

Please note that the Foundation is generally unable to fund all the requests submitted for consideration.

CRITERIA FOR EVALUATING GRANT APPLICATIONS

When considering a grant, the Foundation will consult with the Federation and use the following criteria to evaluate applications:

- The applicant provides services/programs that are essential to the Jewish community of Greater Hartford and that the loss of the organization or services would be detrimental to the long-term viability of our community.
- The applicant reasonably demonstrates its capacity to continue operations in the future, once short-term financial needs are addressed.
- The applicant has taken proactive measures to mitigate its losses/deficit.
- The applicant has demonstrated efforts to seek other financial support.
- The applicant demonstrates existing or potential demand in the community to justify the resources designated for the need.
- The applicant demonstrates verifiable need for funding.
- The support enables the organization to adapt to evolving constituent/community needs, changing strategic organizational goals or other external circumstances (*for Innovation and Efficiency grants only*).

HOW TO APPLY FOR A GRANT

At this time, the Foundation will consider grant requests from our agency partners. As usual, our synagogue partners will be able to apply for one grant per year of up to \$2,000 to meet a strategic, operational or programmatic need. Synagogues are also encouraged to partner with other synagogues or agencies to apply for a larger *Innovation and Efficiency* grant. However, ***if any of our partners – agencies or synagogues -- are experiencing severe financial hardship, please contact us.***

The Foundation will accept grant proposals on a rolling basis beginning **August 1, 2020** and will endeavor to respond to funding requests within four weeks of receipt. The Grants

Committee will likely, in the near future, set various deadlines for applications, which we will communicate to the community.

STEP 1: PROPOSAL

To apply for a COVID-19 Community Grant, an organization must contact Foundation staff to ensure the proposal falls within established guidelines. Foundation staff will work with you determine if a full grant application is appropriate. **For more information, please email grants@jcfhartford.org, or contact Michael Elfenbaum, VP Grants Program, at 860-938-0352 or Jacob Schreiber, CEO, at 913 378 4227.**

STEP 2: GRANT APPLICATION SUBMISSION

We accept applications only from organizations *only after the aforementioned conversation*. Organizations invited to submit full grant applications will be given the application for completion.

STEP 3: REVIEW AND EVALUATION OF FULL GRANT APPLICATIONS

The Foundation Grants Committee will review and evaluate completed grant applications and forward its recommendations to the Board of Trustees. We may invite the organization's staff and lay leadership to meet with the Grants Committee or Board of Directors to better understand their grant proposal.

STEP 4: GRANT DECISIONS

The Board of Trustees makes all final decisions on grant requests. Foundation staff will notify organizations of grant decisions soon after each Board meeting. Grantee organizations must sign grant agreements in order to receive grant funds.

Please note that these criteria and eligibility policies will be reviewed each quarter of FY2021 to address evolving realities.



Community Grants Budget - Projected
July 1, 2020-June 30, 2021
(as of 6/5/2020)

	7/1/20-6/30/21 Projected Amount	Changes Year to Date
Amount Available for Grants under Spending Policy¹	\$1,083,937.00	
Plus: Over/Unexpended prior years' spendable amount	\$212,000.00	
Plus: Grant cancellations		\$170.00
Total Amount Available for Grants in FYE 6/30/2021	\$1,295,937.00	\$170.00
"Contractual" Funding Obligations		
Less: Grants to Federation from Board-restricted funds benefiting the Foundation and the Federation	(\$4,969.00)	\$0.00
Less: Grants to Federation for its discretionary use	(\$148,756.00)	\$0.00
Board Discretionary Grants		
Less: Jewish Community Foundation Operating Support FYE 6/30/2021	(\$325,000.00)	
Above the Line Grants Awarded in FYE 6/30/2021	(\$478,725.00)	\$0.00
"Competitive" Grants		
Less: JT Connect Program Associate ²	(\$40,000.00)	
Less: Mandell JCC PJ Connectors ³	(\$11,310.00)	
Less: Jewish Federation of Greater Hartford Wexner Heritage Program ⁴	(\$11,667.00)	
Less: University of Hartford Hillel Engagement Associate ⁵	(\$35,260.00)	
Competitive Grants Awarded in FYE 6/30/2021	(\$98,237.00)	\$0.00
"Synagogue Community Building Grants"		
Less:		
Synagogue Grants Awarded in FYE 6/30/21	\$0.00	\$0.00
Total Community Grants Awarded in FYE 6/30/2021	(\$576,962.00)	\$0.00
Grant Spending Amount available in FYE 6/30/2021	\$718,975.00	\$170.00

¹ This projected amount is equal to 3.75% (5% spending less 1.25% administrative fee) of the 20-quarter trailing average balance of unrestricted community funds as of June 30, 2020, account the minimum and maximum spending limitations under the Foundation's spending policy.

² The total grant to JT Connect is \$120,000 over 3 years (FY20-\$45,000, FY21-\$40,000 and FY22-\$35,000)

³ The total grant to the Mandell JCC is \$19,340 over 2 years (FY20-\$8,030 and FY21-\$11,310)

⁴ The total grant to the Jewish Federation is \$35,000 over 3 years (FY20-\$11,667, FY21-\$11,667 and FY22-\$11,666)

⁵ The total grant to Hartford Hillel is \$69,020 over 2 years (FY20-\$33,760 and FY21-\$35,260)

S:\Excel\FY2021\Community Grants Budget FY2021

Revised Projection
\$1,083,937.00
\$212,000.00
\$170.00
\$1,296,107.00
(\$4,969.00)
(\$148,756.00)
(\$325,000.00)
(\$478,725.00)
(\$40,000.00)
(\$11,310.00)
(\$11,667.00)
(\$35,260.00)
\$0.00
(\$98,237.00)
\$0.00
\$0.00
(\$576,962.00)
\$719,145.00

20, adjusted to take into



Scholarship Program Guidelines

The Jewish Community Foundation offers two scholarship programs: College Scholarships and the Israel Experience for high school students. Each scholarship has its own set of guidelines.

College Scholarships

The Jewish Community Foundation is pleased to administer college scholarships made possible by generous donors who establish scholarship funds here. Donors define their scholarships differently, but they all share a similar goal: to encourage students to pursue their dreams by pursuing education at an institution of higher learning.

The Foundation offers need-based financial assistance to Jewish students for college and graduate school education, including tuition, fees, room and board.

Eligibility

All applicants must meet the following criteria:

- Applicants must be Jewish (*exceptions noted below);
- Be accepted or currently enrolled at an accredited institution of higher learning in the United States;
- Be a current resident of the Greater Hartford area;
- Be a citizen of the United States;
- In most cases, demonstrate financial need.

Specific funds may include unique criteria such as academic interest or community service experience. We will review your general application with these unique criteria in mind and work to match your needs with the right scholarship funds for you.

*At least one parent is Jewish and applicant identifies as being Jewish or applicant has gone through a formal conversion to Judaism. The Anne E. Wall Scholarship is open to residents of Bloomfield, CT with demonstrated financial need. The June Miller Rosenblatt Scholarship is open to residents of Greater Hartford with demonstrated financial need who are pursuing a major that will lead to a career in education.

Application

Complete only one application to apply for all of our scholarships, and submit your completed application plus all applicable attachments by mail to:

Jewish Community Foundation of Greater Hartford
College Scholarship Program
333 Bloomfield Ave, Suite D
West Hartford, CT 06117

Incomplete applications may not be considered. Recipients of past scholarships are encouraged to apply for, but not guaranteed, future financial assistance.

Confidentiality

All scholarship awards are confidential and a recipient's name would become known only with his or her express permission.

Awards

Awards normally range from \$1,000 to \$3,000.

Deadline and Notification

Scholarship applications for the upcoming academic year must be postmarked no later than April 15th.

The Scholarship Committee meets to review the applications on an anonymous basis, and considers each application for the funds for which the applicant is eligible.

Notification of awards or denial of scholarships is typically in June.

Expectations of Recipients

Recipients of Jewish Community Foundation scholarships, except for reasons of health or other emergency, are expected to complete the year of study for which the scholarship is awarded. Failure to fulfill this commitment will require a refund of the amount expended on the student's behalf. We ask that recipients send acknowledgment letters to the donors who made the scholarship(s) possible.

Israel Experience

The Jewish Community Foundation encourages Jewish high school students to explore and develop their Jewish identity through an immersive Israel travel experience. To assist students and their families, the Foundation is offering a limited number of scholarships worth up to \$6,000 per student for programs in Israel lasting from 4 weeks to one semester.

Eligibility

- Jewish high school students currently in grades 9, 10, and 11 (2019/2020 school year) and who are residents of the Greater Hartford area are eligible to apply.
- Students who have not previously traveled to Israel and demonstrate a financial need receive first priority for scholarships. Rising seniors will have the priority over all applicants in this group. If additional scholarships remain available, students who have previously traveled to Israel and/or do not demonstrate financial need will be considered.

Applications for the current program must be received by **December 30, 2020**, and submitted via mail to the following:

Jewish Community Foundation of Greater Hartford
Attn: Israel Experience Program
333 Bloomfield Ave, Suite D
West Hartford, CT 06117



Investment Policy and Guidelines

Proposed May 16, 2019

Introduction

The Jewish Community Foundation invests the charitable assets it holds to provide support for the community's current needs and to preserve charitable resources for use by future generations. It seeks to achieve these dual objectives through prudent investment and a sound spending policy. The Foundation employs a total return investment approach for its investments in order to achieve its long-term financial objectives balanced with its short-term liquidity needs.

The Foundation's spending policy determines the amount that will be available each year for grant making and for the support of the Foundation's operating budget. The current total spending rate is 5%, subject to a floor of 4% and ceiling of 5.5% of a fund's average fair market value over the preceding 20 quarters. The combination of these two strategies is intended to balance the desire to use current funds for grant making with the need to provide a growing level of distributions in the future.

The overall financial objectives of the Jewish Community Foundation are to:

- Preserve the purchasing power of the Foundation's pooled investment portfolio over time through asset growth in excess of the spending policy plus the rate of inflation.
- Produce a stable and predictable flow of revenue for grant making and custodial distributions.
- Invest assets in order to maximize the long-term return while assuming a reasonable level of risk.

In making investment decisions, the Investment Committee will be guided by the standards of conduct for prudent investing set forth in Section 45a-553b of the Connecticut General Statutes (the "Uniform Prudent Management of Institutional Funds Act"), as amended from time to time. Among the factors, if relevant, to be considered in managing and investing charitable funds are: (1) general economic conditions; (2) the possible effects of inflation or deflation; (3) the expected tax consequences, if any, of investment decisions or strategies; (4) the role each investment plays within the overall portfolio; (5) the expected total return from income and appreciation; (5) other resources of the Foundation; and (6) the needs of the Foundation and the funds it manages to make distributions and preserve capital. All investment decisions will be made in relation to the overall resources of the Foundation and its charitable purposes.

Investment Values and Philosophy

The Foundation's guiding values are central Jewish values of tikkun olam (repairing the world), chesed (loving kindness), tzedakah (justice), and achrayut (communal responsibility). The Foundation's investment decisions should be made with these values in mind. When prudent and in keeping with the overall fiduciary responsibility of the Foundation, investments could include but are not limited to investments that provide support for basic human, social and economic needs; support of Jewish education, connection to Jewish identity and Jewish continuity; strengthening Israel; opposing BDS or other anti-Israel activities; developing the Greater Hartford economy; or furthering the missions of one or more Jewish institutions in Greater Hartford. The following principles will guide the Foundation's pooled investment strategies:

- Establish a target asset mix that is expected to achieve the Foundation's long-term financial objectives. The Foundation's current strategic asset allocation is outlined in Appendix A.
- Assure broad diversification among asset types, managers and individual investments.
- Avoid changes to the target asset mix related to short term forecasts or market timing.
- The Committee may, in its discretion, make investments in asset classes that are not expressly identified in this investment policy, but which are deemed to fit the Foundation's overall financial objectives. Any such investments and adjustments to the portfolio shall be fully documented by the investment consultant and promptly disclosed to the Board of Trustees.

With respect to non-pooled investments, which may include planned gift assets, the Foundation will seek to achieve a total return consistent with the donor's charitable objectives, the duty to give due regard to the interests of both the income and remainder beneficiaries and Connecticut's prudent investor rules. The Foundation has outsourced 95% of its charitable gift annuity contracts to MetLife. All charitable remainder trust contracts remain on the books of the Foundation.

3. Investment Responsibilities

a. Investment Committee

The Investment Committee has responsibility for overseeing the investment of the Foundation's assets with the goal of achieving the Foundation's long-term financial objectives. The Committee is responsible for:

- 1) Recommending the portfolio's asset allocation and rebalancing strategies to the Board of Trustees.
- 2) Reporting on the portfolio to the Board of Trustees on a quarterly basis.
- 3) Monitoring portfolio asset mix and managers' performance on a quarterly basis.

- 4) Selecting/Removing investment managers and monitoring investment performance in view of the Foundation's overall investment strategy, philosophy, and objectives.
- 5) Recommending investment consultants and custodians to the Board of Trustees.
- 6) Evaluating the performance of the investment consultant on an annual basis.
- 7) Reviewing this policy, no less frequently than annually, and recommending changes to the Board of Trustees as may be necessary or desirable.

b. Investment Consultant

The investment consultant is responsible for:

- 1) Assisting the Investment Committee in carrying out its responsibilities.
- 2) Attending Investment Committee meetings.
- 3) Assisting in the development and implementation of investment objectives, policies and guidelines.
- 4) Preparing investment reports, for the Committee's review, that contain information necessary for the Committee to exercise its investment responsibilities.
- 5) Providing monthly asset allocation and investment performance summary reports to Foundation staff on a timely basis.
- 6) Monitoring each investment manager's key personnel and investment style on an ongoing basis and reporting all significant changes to the Foundation.
- 7) Recommending additions, eliminations, or changes in investment managers.
- 8) Providing such documentation that may be reasonably requested by the Investment Committee and that sets forth the selection and retention criteria for each investment manager/investment vehicle engaged by the Foundation.
- 9) Monitoring portfolio exposures versus asset allocation targets, and recommending re- balancing strategies to the Investment Committee as needed.
- 10) Monitoring investments of managers on a quarterly basis for compliance with the manager's stated strategy.
- 11) Assisting the Foundation in communicating investment strategy and performance to various constituencies.

4. Performance Objectives

The long-term performance objective for the Foundation's pooled investment portfolio is to earn a rate of return that is at least equal to the rate of inflation plus the spending rate (the Consumer Price Index plus 5%).

The performance of individual managers will be evaluated against appropriate benchmarks. For the portfolio as a whole, the performance benchmark will consist of a suitable index for each asset class used, weighted according to the Foundation's strategic asset allocation targets listed in Appendix A.

Appendix C defines the current total portfolio benchmark. Overall performance will also be compared with appropriate universes of endowments/foundations.

It is anticipated that the comparison with relevant benchmarks may not be favorable in every quarter or year; however, it is expected that the comparison will be favorable over a market cycle.

5. Investment Performance Review

The Investment Committee will review the performance of the pooled investment portfolio at each quarterly meeting. These reviews will include:

- Review of the portfolio's overall asset allocation to assure adherence to these guidelines.
- Review of the quarterly investment reports prepared by the investment consultant that show asset values, detail investment performance by managers against predetermined benchmarks, comment on relative performance within asset classes and changes in investment managers, investment philosophy strategy, ownership, management and key personnel, and contain other relevant commentary.
- Review of performance against benchmarks.

Appendix A

Strategic Asset Allocation

All figures listed here refer to an asset class's percentage of the total pooled investment portfolio. The minimum and maximum weights listed here represent the acceptable allocation ranges for each asset class. Actual asset allocation will be compared to these ranges on a monthly basis. In the event that the allocation to a particular asset class falls outside of acceptable range, the portfolio will be rebalanced so that all asset classes are within their permitted allocations.

Assets committed to alternative investments but not yet drawn down may be temporarily allocated to other asset classes at the discretion of the Investment Committee. This may cause actual allocations within an asset class to exceed target percentages.

Asset Class	Target	Minimum	Maximum
U.S. Large Cap Equity	15.0%	12.0%	18.0%
U.S. Mid Cap Equity	8.0%	4.0%	10.0%
U.S. Small Cap Equity	8.0%	4.0%	10.0%
Non-U.S. Developed	19.0%	16.0%	22.0%
Non-U.S. Emerging Equity	5.0%	2.0%	8.0%
Special Opportunities	10.0%	6.0%	18.0%
Total Equity	65%		
U.S. Aggregate Bonds	10.0%	7.0%	13.0%
Treasury Inflation Protected Securities	3.0%	0.0%	5.0%
U.S. High Yield Bonds	3.0%	1.0%	5.0%
Global Fixed Income	4.0%	1.0%	7.0%
Total Fixed Income	20%		
Cash/ Cash Equivalents	2.0%	0.0%	5.0%
Total Cash	2%		
Private Assets	8.0%	3.0%	13.0%
Real Assets	5.0%	2.0%	8.0%
Total Alternatives	13%		

Appendix B

Asset Class Definitions/Guidelines

The sections below outline the Foundation's investment parameters and restrictions for each asset class. Many of the current investments are through commingled vehicles and are therefore subject to the guidelines and restrictions put forth in their offering documents/prospectus rather than those specified below. In general, the Foundation seeks to invest with managers whose portfolios comply with the policies below, although specific vehicles may be managed with very different investment parameters and restrictions. The Foundation utilizes these vehicles both due to the specific risk/return parameters of a particular fund along with the manner in which such strategies are able to improve total portfolio diversification.

Domestic Equity

- The domestic equity portfolio will be diversified according to economic sector, industry, number of holdings and other investment characteristics. However, it is recognized that any actively managed portfolio will not be as diversified as the market.
- No more than 7% at cost or 15% at market of a Manager's portfolio may be held in the securities of a single issuer.
- Managers are expected to maintain fully invested portfolios. Thus, cash holdings should generally be less than 3% of the value of the portfolio.

International/Emerging Markets Equity

The following definitions may be used to distinguish between developed and emerging international securities.

International Developed Equity: Listed equity securities traded on developed non-U.S. markets. Developed markets are defined as those included in Morgan Stanley's EAFE index, plus Canada.

Emerging Markets Equity: Listed equity securities traded on emerging non-U.S. markets. Emerging markets are defined as any market that is not included in Morgan Stanley's EAFE index, plus Canada.

All restrictions listed above for Domestic Equity also apply to International/Emerging Markets Equity with the following additions and modifications.

- Managers must hold securities in a minimum of three countries at all times.

Fixed-Income (Investment Grade/TIPS/High Yield)

The following definitions should be used to define the various fixed income segments that the Foundation includes in its portfolio:

US Aggregate Bonds consist primarily of investment grade, US Dollar denominated government, corporate, mortgage and asset backed securities

Treasury Inflation Protected Securities ("TIPS") are US Government issued inflation-linked securities

US High Yield Bonds are primarily US Dollar denominated corporate bonds or bank loans which carry a below investment grade rating from at least one major ratings agency.

Global Bonds consist primarily of investment grade government and corporate bonds issued both within and outside of the United States. Securities issued outside of the United States are frequently denominated in currencies other than the US Dollar.

2) Managers (including the Foundation) are permitted to invest in the following classes of fixed income securities:

- a) Bonds or notes issued by the U.S. government or a U.S. government agency;
- b) Mortgage-backed securities;
- c) Corporate bonds issued in the U.S. and denominated in U.S. dollars.
- d) Asset-backed securities;
- e) Senior secured loans issued and denominated in U.S. dollars;
- f) State of Israel bonds (which may be unrated) up to an aggregate amount not to exceed 5% of the Foundation's pooled fixed-income portfolio.

3) Investment grade bond /TIPS managers are expected to maintain a weighted average credit quality rating for their portfolio that does not fall below AA- as established by a nationally recognized credit rating agency.

4) High yield bond managers are expected to maintain a weighted average credit quality rating for their portfolios that does not fall below B as established by a nationally recognized credit rating agency.

5) No more than 5% at market of a manager's portfolio may be held in the securities of a single corporate issuer. This restriction does not apply to securities issued by the U.S. government or a U.S. government agency.

Global Fixed Income

All restrictions listed above for Fixed Income apply to Global Fixed Income with the following additions.

- 1) Managers must hold securities across a broadly diversified group of countries.
- 2) Managers may hedge currency exposure although it is expected that the portfolio will frequently be un-hedged.

Cash & Cash Equivalents

- 1) Cash or cash equivalent securities may constitute a planned component of the investment portfolio, in the discretion of the Investment Committee.

- 2) Short-term securities are defined as securities having a maturity of one year or less at the time they are acquired and may include, but are not limited to, short-term money market investments, Treasury bills, commercial paper rated A-1 or P-1 or higher and bank certificates of deposit for banks rated AA or better by a nationally recognized credit rating agency.

Special Opportunities

In order to enhance portfolio results, the Foundation may elect to invest in strategies with equity return profiles that involve portfolio concentration by security, country or sector. These strategies may also utilize short selling and long lockups to ensure the stability of the manager's capital base.

Including such approaches is based on the expectation that they will generate high returns, net of fees and will enhance total portfolio diversification due to the less diversified nature of each individual approach.

Private Equity (Buyouts/Venture Capital)

Private Equity is included in the portfolio to increase returns and enhance diversification compared to public equity markets, as these investments are generally not correlated with other Foundation Investments. This is in part due to the expanded opportunity set available by considering private assets. At the same time, it is also due to nature of private assets in terms of ongoing valuation.

The Foundation recognizes that diversification by time and sector is very important. Therefore, the Foundation intends to primarily allocate assets to well-diversified fund of funds managers.

Real Assets

Commodity strategies are included in the portfolio to enhance diversification and lower total portfolio volatility as these investments are generally not highly correlated with other Foundation investments. The Foundation's investments will be liquid and invested via commingled vehicles so specific restrictions cannot be enforced other than to note that the Foundation will not permit the use of leverage.

Appendix C

Total Portfolio Benchmark

The Foundation's total portfolio benchmark is based on its strategic asset allocation using suitable market indices to represent each asset class. This custom index is calculated on a monthly basis using the weights listed below.

Asset Class	Weight	Market Index
US Large Cap Equity	15.0%	S&P 500
US Mid Cap Equity	8.0%	Russell Mid Cap
US Small Cap Equity	8.0%	Russell 2000
Non-U.S. Developed Equity	19.0%	MSCI EAFE
Non-U.S. Emerging Equity	5.0%	MSCI Emerging Markets
Special Opportunities	10.0%	MSCI AC World Index
U.S. Aggregate Bonds	10.0%	Bloomberg Barclays Capital Aggregate
Treasury Inflation Protected Secs	3.0%	Bloomberg Barclays Capital US TIPS
U.S. High Yield Bonds	3.0%	Merrill High Yield
Global Fixed Income	4.0%	Citigroup World Gvt Bond Index
Cash & Cash Equivalents	2.0%	U.S. T-Bills
Private Equity	8.0%	S&P 500
Real Assets	5.0%	Bloomberg Commodity Index

Managers within each asset class will be measured against a specific style benchmark, along with the market benchmark for their asset class as indicated above.



FY2020 Actual Expenses and FY2020 Approved Budget

As of March 31, 2020

		Actual	Actual	Budget			Revised
Description		FY2019	FY2020	FY2020	\$ Variance	% Variance	Budget
REVENUES AND OPERATING SUPPORT GRANTS							FY2020
Administrative Fee Revenue @ 1.00%		645,070	653,316	652,504	812	0.12%	870,000
Administrative Fee Revenue @ 1.25%		312,194	311,095	308,300	2,795	0.91%	411,067
Recovery of Investment Administrative Expense		49,011	50,482	50,481	1	0.00%	67,309
Subtotal Fee revenue		1,006,275	1,014,893	1,011,285	3,608	0.36%	1,348,376
Operating Support Grants:							
General Operating Support Grant		168,750	243,750	243,750	-	0.00%	325,000
Operating Costs for Community Endow Campaign		0	0	0	-	0.00%	-
Center for Innovative Philanthropy - Operating Grant		131,250	0	0	-	0.00%	
Sobtotal Operating Support Grants		300,000	243,750	243,750	-	0.00%	325,000
Foundation /Fundiller-Zweig Tribute Funds Grants		18,568	22,665	26,521	(3,856)	-14.54%	18,691
Donations/Grants to Offset Operating Expenses		0	0	0	-	0.00%	18,818
Other Revenues		14,390	8,320	12,411	(4,091)	-32.97%	16,549
Center for Innovative Philanthropy - Fee Revenue		5,000	0	0	-	0.00%	0
CIP Grant Writer/Outcomes Assesment Training Expenses		0	0	0	-	0.00%	12,173
TOTAL OPERATING REVENUES		1,344,233	1,289,627	1,293,967	(4,340)	-0.34%	1,739,607
PERSONNEL EXPENSES							
Salaries and Other Compensation		859,312	779,929	799,641	(19,712)	-2.47%	1,066,184
Health, Life, Disability Insurance		68,011	83,480	87,561	(4,081)	-4.66%	116,748
Pension - 403(b) Annuity/ Pension Admin Fees		35,688	25,646	28,688	(3,042)	0.00%	28,688
Payroll Taxes		67,374	56,884	59,355	(2,471)	-4.16%	79,137
Workers' Compensation Insurance		2,170	2,385	2,385	-	0.00%	2,385
Payroll Service Fees		1,152	1,314	1,503	(189)	-12.60%	2,000
TOTAL PERSONNEL EXPENSES		1,033,706	949,638	979,133	(29,495)	-3.01%	1,295,142
GENERAL OPERATING EXPENSES							
Office Supplies		2,020	3,539	3,375	164	4.86%	4,500
Books and Subscriptions		1,044	950	939	11	1.18%	1,250
Professional Membership Fees		4,055	3,575	4,875	(1,300)	-26.67%	6,500
Travel/Auto		4,628	329	1,875	(1,546)	-82.43%	2,500
Postage and Shipping		1,885	3,078	2,050	1,028	50.15%	2,500
Telephone		2,566	2,442	3,000	(558)	-18.59%	4,000
Professional Development		10,020	14,720	16,125	(1,405)	-8.71%	21,500
Stationery and Printing		1,343	1,125	2,025	(900)	-44.44%	3,500
Copier Expenses		114	1,124	1,500	(376)	-25.07%	2,000
Insurance		12,297	9,688	10,000	(312)	-3.12%	14,000
Equipment Leases and Purchases		4,072	2,155	4,000	(1,845)	-46.12%	10,000

OF GREATER HARTFORD		Actual	Actual	Budget			Revised
Description		FY2019	FY2020	FY2020	\$ Variance	% Variance	Budget FY2020
	Equipment Repair and General Maintenance	242	108	564	(456)	-80.92%	750
	Occupancy Costs	26,468	40,729	41,000	(271)	-0.66%	84,000
	Software / Online Services	46,414	45,868	46,500	(632)	-1.36%	47,500
	Technology Support	6,004	8,398	6,250	2,148	34.37%	7,500
	Miscellaneous	5,164	5,066	4,250	816	19.21%	5,000
	Trustee and Committee Meetings	1,317	1,589	3,000	(1,411)	-47.03%	4,000
	Other Business Expenses	1,672	810	1,875	(1,065)	-56.80%	2,500
	TOTAL GENERAL OPERATING EXPENSES	131,326	145,294	153,203	(7,909)	-5.16%	223,500
	DEVELOPMENT EXPENSES						
	Yearbook	21,241	15,619	19,000	(3,381)	-17.79%	20,000
	Publications and Collateral	20	12,570	19,500	(6,930)	-35.54%	30,000
	Special Events	30,451	18,261	18,500	(239)	-1.29%	18,500
	Donor Recognition	1,314	1,312	750	562	74.89%	1,000
	Advertising/Promotion	22,269	7,887	24,000	(16,113)	-67.14%	36,000
	Charity Fundraising Advertisements	6,604	2,534	3,000	(466)	-15.52%	5,500
	Marketing Consultant / Intern	0	50	1,875	(1,825)	-97.33%	2,500
	Marketing Materials / Graphic Design	1,725	5,074	3,550	1,524	42.93%	4,000
	Donor Development	12,129	10,969	9,175	1,794	19.55%	10,900
	Center for Innovative Philanthropy - Indicators Project	1,773	0	0	0	0	0
	Center for Innovative Philanthropy (JMAP/Outcomes Meas)	0	0	0	0	0	0
	CIP Grant Writer/Outcomes Assesment Training Expenses	0	0	0	0	0.00%	12,173
	Outreach Programs	1,144	0	3,400	(3,400)	-100.00%	4,795
	Travel/Donor Cultivation	2,252	20	1,500	(1,480)	-98.69%	2,150
	Center for Innovative Philanthropy Training and Education	0	0	0	0	0.00%	-
	TOTAL DEVELOPMENT EXPENSES	100,923	74,296	104,250	(29,954)	-28.73%	147,518
	PROFESSIONAL FEES						
	Legal and Filing Fees	1,407	0	1,875	(1,875)	-100.00%	2,500
	Audit and Tax Return Review Fees	30,150	31,225	33,000	(1,775)	-5.38%	33,000
	Consulting and Personnel Recruiting Fees	10,490	29,176	34,500	(5,324)	-15.43%	35,000
	TOTAL PROFESSIONAL FEES	42,047	60,401	69,375	(8,974)	-12.94%	70,500
	NET OPERATING EXPENSES	1,308,002	1,229,629	1,305,961	(76,332)	-5.84%	1,736,660
	CURRENT PERIOD OPERATING (DEFICIT)/SURPLUS	36,231	59,998	(11,994)	71,992		2,947
	PRIOR YEARS' SURPLUS	234,199	219,284	219,284	-		219,284
	NET OPERATING (DEFICIT)/SURPLUS	270,429	279,282	207,290	71,992		222,231
	LESS: CAPITAL BUDGET	-	0	0	-		12,500
	ADD: DONATIONS/GRANTS for Capital Expenses	-	-	-	-		
	LESS: CIP OUTCOMES MEAS. GRANTS CARRYFD	15,044	-	-	-		-
	SURPLUS/(DEFICIT) CARRYFORWARD - Operating	255,385	279,282	207,290	71,992		209,731
	OPERATING RESERVE*	239,385	239,385	239,385	-		239,385

Jewish Community Foundation of Greater Hartford
Total Managed Assets
Investment Performance and Asset Allocation Summary - Period Ending June 30, 2020
Net of Fees

Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	Periods Ending - June 30, 2020									
					1 mon	3 mon	FYTD ¹	CYTD	1 yr	3 yr	5 yr	7 yr	10 yr	
					%	%	%	%	%	%	%	%	%	
Total Fund	125,710,182	100.0%			2.5	16.0	0.8	-4.5	0.8	4.6	5.0	6.0	7.3	
Total Fund x/Private Equity	116,330,399				2.7	17.5	0.4	-4.8	0.4	4.1	4.7	5.7	6.9	
Overall Market Benchmark ²					2.5	15.3	0.8	-5.7	0.8	4.8	5.1	6.2	7.5	
CPI Plus 5%					0.4	0.4	5.1	1.4	5.1	6.8	6.7	6.5	6.8	
60% MSCI AC World / 40% Barclays Aggregate					2.2	12.5	5.3	-1.0	5.3	6.2	5.9	6.5	7.3	
				% of Equity										
Equity Composite ³	79,190,176	63.0%		100.0%	3.5	25.2	1.9	-4.7	1.9	5.5	6.3	7.9	9.6	
MSCI AC World Index					3.2	19.2	2.1	-6.3	2.1	6.1	6.5	7.8	9.2	
Total Large Cap Composite	20,765,656	16.5%	15.0% (12.0 - 18.0)	26.2%	2.9	23.4	8.9	-1.2	8.9	11.2	10.9	12.5	14.1	
Large Cap Core	7,095,195	5.6%		9.0%	3.7	25.8	17.3	7.5	17.3	15.1	13.3	14.2	15.2	
Fidelity Contrafund - FCNTX - (2/94 -)	5,984,336	4.8%		7.6%	4.0	26.9	17.9	9.6	17.9	16.4	14.1	15.1	15.6	
Jlens Jewish Advocacy Strategy - (9/18 -)	1,110,859	0.9%		1.4%	2.0	20.4	8.3	-2.5	8.3	NA	NA	NA	NA	
S&P 500					2.0	20.5	7.5	-3.1	7.5	10.7	10.7	12.1	14.0	
Large Cap Value	7,659,493	6.1%		9.7%	0.8	17.4	-6.6	-15.1	-6.6	3.3	6.1	8.5	11.2	
Dodge & Cox Stock - DODGX - (2/00 -)	4,974,607	4.0%		6.3%	1.8	20.0	-6.2	-15.0	-6.2	3.0	5.9	8.6	11.8	
Vanguard Value Index Admiral - VVIAX - (5/15 -)	2,684,887	2.1%		3.4%	-1.0	12.7	-7.4	-15.4	-7.4	3.9	6.4	NA	NA	
S&P 500					2.0	20.5	7.5	-3.1	7.5	10.7	10.7	12.1	14.0	
Russell 1000 Value					-0.7	14.3	-8.8	-16.3	-8.8	1.8	4.6	7.1	10.4	
Large Cap Growth	6,010,967	4.8%		7.6%	4.8	29.0	24.8	11.3	24.8	18.0	14.9	15.9	16.8	
Vanguard Growth Index Admiral - VIGAX - (5/02 -)	6,010,967	4.8%		7.6%	4.8	29.0	24.8	11.3	24.8	18.0	14.9	15.9	16.8	
S&P 500					2.0	20.5	7.5	-3.1	7.5	10.7	10.7	12.1	14.0	
Russell 1000 Growth					4.4	27.8	23.3	9.8	23.3	19.0	15.9	16.6	17.2	
Total Mid Cap Composite	10,194,140	8.1%	8.0% (5.0 - 11.0)	12.9%	1.3	26.2	1.1	-6.0	1.1	6.4	7.2	9.6	11.7	
Mid Cap Core	3,933,418	3.1%		5.0%	2.0	25.0	-0.2	-7.2	-0.2	6.5	7.0	9.8	12.5	
Vanguard Index FDS Vanguard Mid - VO - (2/07 -)	3,933,418	3.1%		5.0%	2.0	25.0	-0.2	-7.2	-0.2	6.5	7.0	9.8	12.5	
Russell Mid Cap					1.8	24.6	-2.2	-9.1	-2.2	5.8	6.8	9.4	12.3	
Mid Cap Value	2,704,678	2.2%		3.4%	0.0	25.9	-0.6	-9.4	-0.6	-0.4	2.5	4.5	6.9	
Iridian Private Business Mid Cap - (9/15 -)	2,704,678	2.2%		3.4%	0.0	25.9	-0.6	-9.4	-0.6	-0.4	NA	NA	NA	
Russell Mid Cap					1.8	24.6	-2.2	-9.1	-2.2	5.8	6.8	9.4	12.3	
Russell Mid Cap Value					1.1	19.9	-11.8	-18.1	-11.8	-0.5	3.3	6.6	10.3	
Mid Cap Growth	3,556,044	2.8%		4.5%	1.7	27.8	3.9	-1.8	3.9	11.3	10.6	13.4	15.0	
T Rowe Price Mid Cap Growth - RPMGX - (9/00 -)	3,556,044	2.8%		4.5%	1.7	27.8	3.9	-1.8	3.9	11.3	10.6	13.4	15.0	
Russell Mid Cap					1.8	24.6	-2.2	-9.1	-2.2	5.8	6.8	9.4	12.3	
Russell Mid Cap Growth					2.3	30.3	11.9	4.2	11.9	14.8	11.6	13.2	15.1	
Total Small Cap Composite	10,096,524	8.0%	8.0% (5.0 - 11.0)	12.7%	3.4	32.9	-2.6	-6.8	-2.6	4.4	4.8	6.4	9.1	
Small Cap Value	4,228,247	3.4%		5.3%	2.6	22.3	-20.6	-25.5	-20.6	-7.5	-2.7	0.8	4.6	
DFA US Small Cap Value Port. Instl. - DFSVX - (5/19 -)	4,228,247	3.4%		5.3%	2.6	22.3	-20.6	-25.5	-20.6	NA	NA	NA	NA	
Russell 2000					3.5	25.4	-6.6	-13.0	-6.6	2.0	4.3	7.2	10.5	
Russell 2000 Value					2.9	18.9	-17.5	-23.5	-17.5	-4.3	1.3	4.0	7.8	
Small Cap Growth	5,868,276	4.7%		7.4%	4.0	41.7	16.3	13.6	16.3	18.6	13.4	12.8	14.2	
Jackson Square SMID Cap Growth - DCGTX - (9/15 -)	5,868,276	4.7%		7.4%	4.0	41.7	16.3	13.6	16.3	19.2	NA	NA	NA	
Russell 2000					3.5	25.4	-6.6	-13.0	-6.6	2.0	4.3	7.2	10.5	
Russell 2000 Growth					3.8	30.6	3.5	-3.1	3.5	7.9	6.9	10.0	12.9	

Jewish Community Foundation of Greater Hartford

Total Managed Assets Investment Performance and Asset Allocation Summary - Period Ending June 30, 2020 Net of Fees

Annualized														
Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	Periods Ending - June 30, 2020									
					1 mon %	3 mon %	FYTD ¹ %	CYTD %	1 yr %	3 yr %	5 yr %	7 yr %	10 yr %	
Total International Composite	22,319,116	17.8%	19.0%	28.2%	3.6	19.6	-5.3	-11.5	-5.3	-0.5	1.9	3.6	5.0	
			(14.0 - 20.0)											
International Core	6,575,050	5.2%		8.3%	3.4	17.4	-4.3	-10.8	-4.3	0.8	2.3	4.3	4.8	
Vanguard Developed Markets Index Admiral - VTMGX - (5/12 -)	6,575,050	5.2%		8.3%	3.4	17.4	-4.3	-10.8	-4.3	0.9	2.4	4.2	NA	
MSCI EAFE					3.4	14.9	-5.1	-11.3	-5.1	0.8	2.1	3.9	5.7	
International Value	10,200,431	8.1%		12.9%	3.0	15.7	-13.5	-20.9	-13.5	-4.9	-0.7	1.8	4.3	
Sanderson International Value - (9/15 -)	5,226,577	4.2%		6.6%	3.7	13.3	-12.1	-19.1	-12.1	-4.2	NA	NA	NA	
Wellington International Contrarian Value - (5/15 -) ⁴	4,973,854	4.0%		6.3%	2.3	18.3	-15.3	-22.6	-15.3	-5.8	-0.1	NA	NA	
MSCI EAFE					3.4	14.9	-5.1	-11.3	-5.1	0.8	2.1	3.9	5.7	
MSCI EAFE Value					3.6	12.4	-14.5	-19.3	-14.5	-4.4	-1.6	1.2	3.5	
International Growth	5,543,636	4.4%		7.0%	3.4	31.4	11.7	8.8	11.7	NA	NA	NA	NA	
Brown International Small Company Instl. - BCSFX - (11/18 -)	5,543,636	4.4%		7.0%	3.4	31.4	11.7	8.8	11.7	NA	NA	NA	NA	
MSCI EAFE					3.4	14.9	-5.1	-11.3	-5.1	0.8	2.1	3.9	5.7	
MSCI EAFE Growth					3.2	17.0	4.2	-3.5	4.2	5.9	5.5	6.5	7.8	
Emerging Markets	5,647,742	4.5%	5.0%	7.1%	5.8	18.7	-11.5	-13.6	-11.5	-2.3	0.7	1.1	1.7	
DFA Emerging Markets - DFEVX - (10/10-)	2,695,445	2.1%	(2.0 - 8.0)	3.4%	5.6	19.0	-17.3	-18.9	-17.3	-3.7	0.1	0.8	NA	
Elephant Long Only Emerging Markets Fund (9/19 -)	1,473,952	1.2%		1.9%	9.0	31.5	NA	-7.6	NA	NA	NA	NA	NA	
Himalaya Capital Investors (9/19 -) ⁴	1,478,344	1.2%		1.9%	3.2	7.8	NA	-8.7	NA	NA	NA	NA	NA	
MSCI Emerging					7.4	18.1	-3.4	-9.8	-3.4	1.9	2.9	3.2	3.3	
MSCI China					9.0	15.3	13.1	3.5	13.1	8.6	5.3	9.3	6.4	
Special Opportunities	10,166,998	8.1%	10.0%	12.8%	6.9	34.0	5.4	3.2	5.4	NA	NA	NA	NA	
MSCI ACWI					3.2	19.2	2.1	-6.3	2.1	6.1	6.5	7.8	9.2	
Gobi Concentrated Fund - (8/17 -)	2,956,113	2.4%	(7.0 - 13.0)		4.0	31.3	2.4	-4.5	2.4	NA	NA	NA	NA	
MSCI ACWI Value Index					1.2	12.7	-11.8	-17.8	-11.8	-1.0	1.9	3.9	6.1	
MSCI World Index					2.6	19.4	2.8	-5.8	2.8	6.7	6.9	8.4	10.0	
Tybourne Long Opportunities Fund - (9/17 -) ⁴	7,210,885	5.7%			8.1	35.2	6.7	6.7	6.7	NA	NA	NA	NA	
MSCI ACWI Growth Index					5.1	25.1	16.6	5.5	16.6	13.2	10.8	11.6	12.0	
65% MSCI Asia / 35% S&P 500					3.9	16.8	4.3	-4.7	4.3	6.0	6.4	7.9	8.8	
				% of Alternatives										
Alternative Composite	14,452,277	11.5%		100.0%	0.9	1.9	-3.5	-8.2	-3.5	3.4	1.8	2.9	4.4	
Private Equity*	9,379,783	7.5%	8.0%	64.9%	0.0	0.0	5.2	-1.5	5.2	12.2	9.7	12.5	13.0	
S&P 500			(3.0 - 13.0)		2.0	20.5	7.5	-3.1	7.5	10.7	10.7	12.1	14.0	
S&P 500 +5%					2.4	22.0	13.0	-0.6	13.0	16.4	16.4	17.8	19.8	

				Commitment	Remaining Commitment	YTD - Capital Calls	YTD - Distributions	IRR	IRR as of	Cumulative Distributions
CommonFund Private Equity Partners V (1/02 -)	4,584	0.0%		\$1,750,000	\$61,250	\$0	\$83,206	10.8%	3/31/2020	\$3,037,241
CommonFund Venture Partners VI (3/02 -)	122,795	0.1%		\$1,225,000	\$33,628	\$0	\$3,087	8.3%	3/31/2020	\$1,906,819
Aberdeen Private Equity III (2/06 -)	211,058	0.2%		\$1,000,000	\$0	\$0	\$13,111	10.0%	12/31/2019	\$1,602,350
Aberdeen International (2/06 -)	212,071	0.2%		\$500,000	\$10,000	\$0	\$24,892	11.7%	12/31/2019	\$827,561
Aberdeen Venture Partners VI (2/06 -)	447,722	0.4%		\$1,000,000	\$20,000	\$0	\$93,641	10.7%	12/31/2019	\$1,449,283
Aberdeen Private Equity V (12/12 -)	691,248	0.5%		\$750,000	\$0	\$34,114	\$58,084	16.4%	12/31/2019	\$549,829
Weathergage Venture Capital III (12/14 -)	2,066,110	1.6%		\$1,500,000	\$345,000	\$0	\$0	18.3%	12/31/2019	\$50,831
Aberdeen Private Equity VI (5/15 -)	1,952,068	1.6%		\$2,000,000	\$200,000	\$0	\$51,084	20.3%	12/31/2019	\$719,939
Weathergage Venture Capital IV (6/16 -)	1,861,506	1.5%		\$2,000,000	\$640,000	\$160,000	\$0	23.2%	12/31/2019	\$0
Eightfold Opportunity III (2/18 -)	812,654	0.6%		\$1,000,000	\$296,077	\$0	\$133,062	NM	NA	\$177,295
747 Stuyvesant VI Parallel Fund (5/18 -)	801,599	0.6%		\$2,000,000	\$1,200,000	\$200,000	\$0	NM	NA	\$0
Accolade Partners VII (7/19 -)	196,369	0.2%		\$1,500,000	\$1,281,678	\$75,000	\$0	NM	NA	\$0
Total Private Equity				\$16,225,000	\$4,087,633	\$469,114	\$460,167			\$10,321,148

Real Assets Composite	5,072,493	4.0%	5.0%	35.1%	2.5	5.6	-15.8	-18.2	-15.8	-3.7	-6.2	-6.9	-3.6		
DFA Commodity Strategy Instl. - DCMSX - (1/18 -)	5,072,493	4.0%	(2.0 - 8.0)	35.1%	2.5	5.6	-15.8	-18.2	-15.8	NA	NA	NA	NA		
Bloomberg Commodity Index					2.3	5.1	-17.4	-19.4	-17.4	-6.1	-7.7	-8.1	-5.8		
S&P North American Natural Resources Index					0.9	31.3	-24.4	-26.3	-24.4	-8.0	-6.5	-4.8	-0.7		

Jewish Community Foundation of Greater Hartford
Total Managed Assets
Investment Performance and Asset Allocation Summary - Period Ending June 30, 2020
Net of Fees

Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	Periods Ending - June 30, 2020								Annualized		
					1 mon	3 mon	FYTD ¹	CYTD	1 yr	3 yr	5 yr	7 yr	10 yr		
					%	%	%	%	%	%	%	%	%		
<u>Fixed Income Composite</u>	<u>23,574,039</u>	<u>18.8%</u>		<u>% of Fixed 100.0%</u>	<u>0.8</u>	<u>4.2</u>	<u>4.9</u>	<u>2.6</u>	<u>4.9</u>	<u>3.8</u>	<u>3.5</u>	<u>3.3</u>	<u>3.7</u>		
<u>Investment Grade Fixed Income</u>	<u>10,510,519</u>	<u>8.4%</u>	<u>10.0%</u>	<u>44.6%</u>											
Vanguard Total Bond Market Index Admiral - VBT LX - (8/01 -)	6,356,333	5.1%	<u>(7.0 - 13.0)</u>	<u>27.0%</u>	0.7	3.0	9.0	6.4	9.0	5.3	4.2	3.9	3.7		
Income Research & Management (8/14 -)	3,400,923	2.7%		<u>14.4%</u>	1.2	4.7	9.7	7.1	9.7	5.6	4.5	NA	NA		
Barclays Capital Aggregate Bond Index					0.6	2.9	8.7	6.1	8.7	5.3	4.3	4.0	3.8		
Barclays Capital Intermediate Credit					1.4	6.7	7.0	4.2	7.0	4.9	4.2	3.9	4.2		
Ladder Bonds	753,263	0.6%		<u>3.2%</u>	0.0	0.0	0.8	0.3	0.8	1.3	1.2	1.4	1.7		
Barclays Capital Intermediate Credit					1.4	6.7	7.0	4.2	7.0	4.9	4.2	3.9	4.2		
<u>High Yield Fixed Income</u>	<u>3,652,694</u>	<u>2.9%</u>	<u>3.0%</u>	<u>15.5%</u>											
OHA Diversified Credit Strategies Fund (Offshore) (10/14 -) ⁴	3,652,694	2.9%	<u>(1.0 - 5.0)</u>	<u>15.5%</u>	1.9	12.2	-0.1	-3.8	-0.1	2.7	3.8	NA	NA		
50% CSFB Lev. Loan/50% Barclays Corp. HY					1.2	9.9	-1.1	-4.3	-1.1	2.7	3.9	4.1	5.5		
Merrill High Yield					1.0	9.6	-1.1	-4.7	-1.1	3.0	4.6	4.8	6.5		
<u>Global Fixed Income</u>	<u>5,249,289</u>	<u>4.2%</u>	<u>4.0%</u>	<u>22.3%</u>											
Colchester Global Bond Fund (3/10 -)	5,249,289	4.2%	<u>(1.0 - 7.0)</u>	<u>22.3%</u>	0.8	5.5	3.5	1.4	3.5	3.2	3.1	1.9	2.9		
FTSE World Govt Bond Index					0.6	2.0	4.6	4.1	4.6	4.0	3.7	2.2	2.4		
<u>TIPS Fixed Income</u>	<u>4,161,536</u>	<u>3.3%</u>	<u>3.0%</u>	<u>17.7%</u>											
Vanguard TIPS (6/10 -)	4,161,536	3.3%	<u>(0.0 - 6.0)</u>	<u>17.7%</u>	1.0	4.1	8.1	6.0	8.1	4.9	3.7	3.0	3.4		
Barclays Capital US TIPS					1.1	4.2	8.3	6.0	8.3	5.0	3.7	3.0	3.5		
<u>Cash</u>	<u>8,493,691</u>	<u>6.8%</u>	<u>2.0%</u>												
<u>Corporate Cash</u>	5,354,786	4.3%													
<u>New Fidelity Cash Account</u>	3,129,671	2.5%													
<u>Citizen Bank Cash</u>	9,233	0.0%													

1 - Fiscal Year ends June 30th.

2 - As of 6/1/2019, the Overall Market Benchmark is composed of: 10% Barclays Capital Aggregate, 23% S&P 500, 8% Russell MidCap, 8% Russell 2000, 10% MSCI AC World, 19% MSCI EAFE, 5% MSCI EME, 3% ML HY, 4% FTSE WGBI, 5% Bloomberg Commodity Index, 3% BC US TIPS and 2% 90 Day T-Bills.

3 - The Equity Composite return includes Private Equity historical returns up to 02/1/2007.

4. Preliminary value based on Manager data.

Managed Portfolio Investment Performance

Periods ending June 30, 2020

				<u>Annualized</u>			
	<u>3 mon</u>	<u>CYTD</u>	<u>FYTD</u>	<u>1 year</u>	<u>3 year</u>	<u>5 year</u>	<u>10 year</u>
Jewish Community Foundation Total Managed Portfolio	16.0%	-4.5%	0.8%	0.8%	4.6%	5.0%	7.3%
<i>60% MSCI AC World/ 40% Barclays Aggregate Bond Index¹</i>	12.5%	-1.0%	5.3%	5.3%	6.2%	5.9%	7.3%
<i>Standard & Poor's 500 Composite Stock Index²</i>	20.5%	-3.1%	7.5%	7.5%	10.7%	10.7%	14.0%
<i>Barclays Capital Aggregate Bond Index³</i>	2.9%	6.1%	8.7%	8.7%	5.3%	4.3%	3.8%
<i>Overall Market Benchmark with HFRI⁴</i>	15.3%	-5.7%	0.8%	0.8%	4.8%	5.1%	7.5%

¹ 60% MSCI AC World/ 40% Barclays Aggregate Bond Index: A benchmark its 60% of the Morgan Stanley All Country World index which includes equities from the United States, developed and emerging markets from around the world. It is also 40% invested in the Barclays Aggregate Bond Index, a measure of primarily US dollar denominated, investment grade fixed income securities

² S&P 500: A market capitalization-weighted price-only index comprised of 500 widely held common stocks listed on the New York Stock Exchange and NASDAQ. It is used as a benchmark to measure the overall performance of the U.S. stock market.

³ Barclays Capital Aggregate Bond: An unmanaged market value-weighted index comprised of U.S. investment grade, fixed rate bond market securities, including U.S. Government bonds, corporate bonds (minimum grade Baa), mortgage pass-through securities, commercial mortgage-backed securities and asset-backed securities that are publicly offered for sale in the United States. Effective November 3, 2008, the Lehman Brothers Aggregate Bond Index was rebranded Barclays Capital Aggregate Bond Index. There have been no changes to the calculation or definition of the index data.

⁴ Overall Market Benchmark with HFRI: As of 1/1/2018, this benchmark is composed of the following indices: 10% Barclays Capital Aggregate; 23% Standard & Poor's 500; 8% Russell MidCap; 8% Russell 2000; 7% Morgan Stanley Capital International(MSCI) AC World, 17% MSCI EAFE; 5% Morgan Stanley Emerging Market Equities (MSCI EME); 3% Merrill Lynch U.S. High Yield; 4% Citi World Government Bond Index; 5% Bloomberg Commodity Index; 3% Barclays Capital U.S. Treasury Inflation Protection Securities; 2% 90-day Treasury Bills; and 5% HFRI Fund of Funds.



BOARD OF TRUSTEES POSITION DESCRIPTION

Mission Statement: The Jewish Community Foundation of Greater Hartford unlocks the transformative power of personalized and collective philanthropy to solve problems, strengthen community organizations and provide permanent support for our Jewish community.

Vision Statement: Jewish. Community. Forever.

Trustee Profile

Individuals considered for nomination as a Trustee shall be active and respected Jewish community volunteers in Greater Hartford. They should be donors to the Jewish Federation and other Jewish organizations, understand the importance of endowments, and be enthusiastic about serving on the Foundation Board.

Trustees must possess a breadth of community knowledge and experience, be able to exercise independent judgment on matters relating to agencies with which they have been active as a volunteer, and have expertise and interest in one or more of the following: financial matters, grantmaking, governance, community-building, strategy, planning or fund development. So that the Foundation can credibly cultivate contributions from potential donors, the Foundation expects that all Trustees will establish a fund during their Board tenure or make a regular contribution to the Foundation that is personally meaningful.

Expectations of Trustees

The Board of Trustees supports the work of the Foundation and provides mission-based leadership and strategic governance. While day-to-day operations are led by the Foundation's CEO and professional staff, the Board-CEO relationship is a partnership, and the appropriate involvement of the Board is both critical and expected. Specific Board Member leadership, governance and oversight responsibilities include:

- Serving as a trusted advisor to the CEO on a variety of matters concerning the Foundation
- Helping establish the mission, vision and values of the organization, by participating in the development of a periodically updated "strategic plan," and by reaching agreement on, and overseeing, the broad policies, measures and adjustments necessary to implement it
- Attending and participating in Board meetings -- Trustees are expected to: be familiar with the materials to be discussed at Board meetings; comment or ask pertinent questions (at meetings and/or of the CEO) to advance important issues for consideration and discussion by the Board; support the decisions of the Board once they are made; act in a manner consistent with the Foundation's values, and; keep sensitive and confidential information confidential
- Approving the Foundation's annual budget and grants made from unrestricted funds, accepting the annual audit, and being involved in/voting on all material business decisions
- Serving on at least one committee or task force and taking on special assignments

- Approving the hiring and evaluation of the CEO of the Foundation
- Assisting the CEO and Board and Governance Committee Chair in identifying and recruiting other Board Members
- Attending the Foundation's annual Donor Appreciation event
- Acting as an ambassador for the organization to the community and its stakeholders
- Assisting staff in identifying, educating and cultivating prospective donors, as appropriate
- Being informed of, and meeting, all fiduciary responsibilities of a trustee of a non-profit Board
- Supporting the Foundation's commitment to a diverse board and staff that reflects the community the Foundation serves

Board Terms

Trustees serve a Board term of three years and are eligible for re-appointment to an additional three-year term. *Only Trustees who have satisfied the above expectations will be considered eligible for re-election to a second term of office.* After six consecutive years on the Board, Trustees must take at least one year off from Board service (unless they are serving as an Officer) before being eligible to return for up to two additional, three-year terms. Maximum lifetime service cannot exceed 12 years. Board meetings are held five to six times each year and committee meetings are generally held in advance of and in coordination with Board meetings.

THE ENDOWMENT FOUNDATION OF
THE JEWISH FEDERATION OF GREATER HARTFORD, INC.

CONSENT OF INCORPORATOR
IN LIEU OF ORGANIZATION MEETING

The undersigned, the Incorporator of The Endowment Foundation of the Jewish Federation of Greater Hartford, Inc., a Connecticut nonstock corporation to be formed under the laws of the State of Connecticut (the "Foundation"), consents to the taking of any action necessary to the organization and incorporation of The Endowment Foundation of the Jewish Federation of Greater Hartford, Inc. and specifically to the following resolutions:

Resolved: That a nonstock corporation be formed under the laws of the State of Connecticut, to be known as The Endowment Foundation of the Jewish Federation of Greater Hartford, Inc. and that a Certificate of Incorporation executed by the Incorporator as provided by law be filed in the office of the Secretary of State. A copy of the Certificate of Incorporation of the Foundation is ordered to be filed with the minutes of the Foundation;

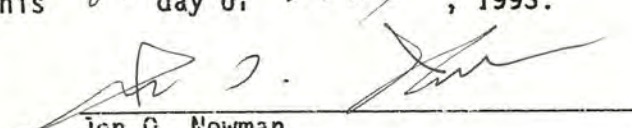
Resolved: That the appropriate taxes and fees for the Foundation be paid to the Secretary of State;

Resolved: That Attorney Doreen Fundiller-Zweig of West Hartford, Connecticut be appointed statutory agent for service of process of the Foundation and that a certificate of such appointment executed by the Incorporator as provided by law be filed in the office of the Secretary of State. A copy of the appointment is ordered to be filed with the minutes of the Foundation;

Resolved: That the following individuals be the Trustees of the Foundation to hold office until their successors are duly elected and qualified: Philip D. Feltman, Bruce A. Fischman, Hinda N. Fisher, Evelyn Gilman, Robert B. Goldfarb, Arnold C. Greenberg, Simon Konover, Georgette Koopman, Hartzel Z. Lebed, Hon. Jon O. Newman, Peter M. Savin, Frank Stavis (ex-officio), Robert Siskin, Michael Suisman, Marjorie M. Waltman; and

Resolved: That the attached Bylaws be hereby adopted as the Bylaws of the Foundation.

Dated at West Hartford, Connecticut, this 20th day of May, 1993.


Jon O. Newman
Incorporator

**CONFIRMATION OF FILING
AND RECEIPT OF FEES**

61-304 REV. 2/89

STATE OF CONNECTICUT
Office Of The Secretary Of The State
Commercial Recording Division
30 TRINITY STREET, HARTFORD, CONNECTICUT 06106

NAME OF CORPORATION

ENDOWMENT FOUNDATION OF THE JEWISH FEDERATION OF GREATER HARTFORD, INC. THE

DOCUMENT FILED	FILING DATE	TOTAL FEES PAID
CERTIFICATE OF INCORPORATION	26/MAY/1993	\$65.00

The information shown above pertains to documents filed in this office on account of the corporation indicated. The filing date is the date endorsed on the document pursuant to Section 33-285 or 33-422 of the Connecticut General Statutes.

Any questions regarding this filing should be addressed to:

THE ABOVE ADDRESS

DOREEN FUNDILLER-ZWEIG
41 NORTH MAIN ST
WEST HARTFORD

CT 06107

CERTIFICATE OF INCORPORATION
OF
THE ENDOWMENT FOUNDATION OF THE
JEWISH FEDERATION OF GREATER HARTFORD, INC.

The undersigned incorporator, desiring to form a nonprofit corporation under the Nonstock Corporation Act of the State of Connecticut, does hereby certify:

ARTICLE I. NAME

The name of the Corporation shall be The Endowment Foundation of the Jewish Federation of Greater Hartford, Inc. (the "Foundation").

ARTICLE II. PURPOSE

The nature of the activities to be conducted and the purposes to be carried out by the Foundation are as follows:

A. To promote and support activities that are consistent with the purposes of The Hartford Jewish Federation, a specially chartered Connecticut corporation (the "Federation").

B. To pursue the foregoing objectives by: (i) soliciting and receiving gifts, contributions, grants, bequests and devises, including, but not limited to, funds properly transferred to the Foundation by the Federation; (ii) holding, investing and reinvesting, and managing and administering such monies or other property received; and (iii) making distributions of the foregoing monies for any proper purpose. In any case in which specific funds transferred to the Foundation from the Federation or received by the Foundation from any other source are subject to any express restriction on use for the benefit of Federation, its agencies, or for any one or more of the charitable purposes or activities of the Federation or to any other express condition, such transferred funds and the income therefrom shall be

distributed or otherwise utilized, in accordance with the provisions of this Section 2, solely in conformity with such restriction or condition.

C. To operate exclusively for charitable, educational and scientific purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code of 1986, as amended (the "Code") (or the corresponding provision of any future federal internal revenue law).

D. To engage, subject to the provisions of Article VI, in any lawful act or activity for which a corporation may be organized under the Connecticut Nonstock Corporation Act.

ARTICLE III. NONPROFIT CORPORATION

✓ The Foundation is a nonprofit corporation and shall not have or issue shares of stock or pay dividends.

ARTICLE IV. MEMBERSHIP

✓ The Foundation shall have no members.

ARTICLE V. BOARD OF TRUSTEES

The activities, business, property, and affairs of the Foundation shall be managed by a self-perpetuating Board of Trustees as prescribed in the Foundation's Bylaws.

At least seventy percent (70%) of the trustees shall be directors of the Federation at the time of a trustee's initial election to the Board of Trustees. In addition, the election of all trustees shall be subject to the approval of the Federation.

A trustee of the Foundation shall not be liable to the Foundation for a breach of duty as a trustee for monetary damages in an amount in excess of the compensation received by such trustee for serving the Foundation during the year of such breach (or lesser amount as may hereafter be permitted by

the Connecticut Nonstock Corporation Act), except to the extent such exemption from liability or limitation thereof is not permitted under the Connecticut Nonstock Corporation Act as currently in effect or as the same may hereafter be amended. No amendment, modification or repeal of this provision shall adversely affect any right or protection of a trustee that exists at the time of such amendment, modification or repeal.

ARTICLE VI. LIMITATIONS

✓ No part of the net earnings of the Foundation shall inure to the benefit of, or be distributable to its trustees, officers, or other private persons, except that the Foundation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article II. No substantial part of the activities of the Foundation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Foundation shall not participate in, or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office.

Notwithstanding any other provision of this Certificate of Incorporation, the Foundation shall not conduct any activities not permitted to be carried on by a corporation exempt from federal income tax under Section 501(c)(3) of the Code (or the corresponding provision of any future federal internal revenue law), or by a corporation, contributions to which are deductible under Sections 170(c)(2), 2055(a)(2) and 2522(a)(2) of the Code (or the corresponding provisions of any future federal internal revenue law).

ARTICLE VII. FUNDAMENTAL CHANGES

The Board of Trustees, by a two-thirds vote of the then serving trustees, may at any meeting of the Board of Trustees called for such purpose, subject to the approval of the Federation:

A. Amend, in whole or in part, the Foundation's Certificate of Incorporation, except that no such amendment shall operate, other than in the manner provided in Paragraphs B and C of this Article, to terminate the deductibility of gifts to the Foundation for federal tax purposes, or the federal income tax exemption of the Foundation as an organization described in Section 501(c)(3) of the Code (or the corresponding provision of any future federal internal revenue law);

B. Merge, consolidate or sell assets under the provisions of Part VII of the Nonstock Corporation Act (or the corresponding provisions of successor statutes); and

C. Dissolve the Foundation.

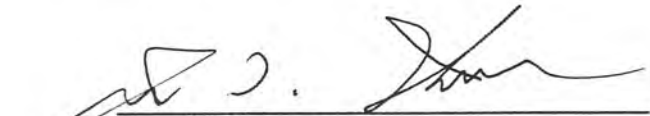
ARTICLE VIII. DISSOLUTION

Upon the dissolution of the Foundation, the Board of Trustees shall, after paying or making provision for the payment of all the liabilities of the Foundation, transfer all of the remaining assets of the Foundation exclusively to the Federation, or its successor, provided it or its successor is then an organization described in Section 501(c)(3) of the Code, or if neither it nor any successor is then so described or exists, then to such organization or organizations organized and operated exclusively for charitable, education or scientific purposes as shall at the time qualify as an exempt organization or organizations under Section 501(c)(3) of the Code (or the corresponding provision of any future federal internal revenue law), for uses consistent with the charitable purposes of the Federation, as the

Board of Trustees shall determine.

Dated ^{last} at Hartford, Connecticut, this 20 day of May, 1993.

I hereby declare, under the penalty of false statement, that the statements made in the foregoing certificate are true.


Jon O. Newman
Incorporator

FILED
STATE OF CONNECTICUT
MAY 26 1993

Pauline R. Hyatt
SECRETARY OF THE STATE
BY MS Time 5:12 P.M.

F.I. 10
Ftx 30
Exp # 65.00

Rec - *Per*
To: *SP 5/27/93*
Doreen Furdiller -
Zweig
41 North MAIN ST
West HARTFORD, Conn
06107



AMENDED AND RESTATED BYLAWS

ARTICLE I. NAME

The name of the corporation is the Jewish Community Foundation of Greater Hartford, Inc. (the "Foundation").

ARTICLE II. PURPOSES

The nature of the activities to be conducted and the purposes to be carried out by the Foundation are to engage in any lawful act or activity for which a corporation may be organized under the Connecticut Revised Nonstock Corporation Act (or the corresponding provision of any future Connecticut nonstock corporation law) (the "Act")), and more particularly:

- A. To operate exclusively for religious, charitable, scientific, literary and educational purposes within the meaning of section 501(c)(3) of the Internal Revenue Code of 1986, as amended (or the corresponding section of any future federal tax law (the "Code")).
- B. To promote and support activities that are consistent with the purposes of the Jewish Federation of Greater Hartford (the "Federation").
- C. To (i) solicit and receive gifts, contributions, grants, bequests and devises, and any other transfers of property, real or personal, tangible or intangible; (ii) hold, invest and reinvest, and manage and administer such monies or other property received; and (iii) make distributions for any proper purpose.

In any case in which funds held by the Foundation are subject to any express restriction on use or to any other express condition, such funds shall be distributed, or otherwise utilized in conformity with such restriction or condition, unless, in the sole judgment of the Board of Trustees, the restriction or condition becomes in effect, unnecessary, incapable of fulfillment or inconsistent with the needs of the community served by the Foundation or the Foundation's charitable purposes. In that event, the Board of Trustees, in its sole discretion, may modify any restriction or condition on the distribution of funds and shall apply or use the funds, to the extent practicable, in a manner which closely approximates the charitable purpose of the funds as evidenced by the document setting forth the terms of the gift.

D. To serve as trustee or co-trustee of charitable remainder trusts, charitable lead trusts and other trust arrangements under which the Foundation, the Federation, a Federation beneficiary agency or any other charity is a charitable beneficiary.

ARTICLE III. TRUSTEES

Section 3.1. Number and Qualifications. The property and affairs of the Foundation shall be managed by a Board of Trustees of not fewer than 10 nor more than 16 voting trustees. The number of trustees shall be the number fixed by resolution of the trustees, or, in the absence of a resolution, the number of trustees serving at the close of the preceding annual meeting of the Foundation.

At least seventy percent (70%) of the trustees shall be directors, community trustees, life community trustees, or members of committees or task forces of the Federation at the time of a trustee's initial election to the Board of Trustees.

The Chair of the Federation shall serve as an *ex-officio* member of the Board of Trustees with the right to be counted in determining a quorum and shall be entitled to vote.

Section 3.2. Staggered Terms. The trustees shall be divided into three classes of as nearly equal size as may be practicable, with the term of one class of trustees expiring at each annual meeting of the Foundation.

Section 3.3. Election of Trustees and Terms of Office. The Governance Committee, after consulting with the Chair of the Federation, shall submit a slate of nominees to the Board of Trustees for its consideration.

At each annual meeting of the Foundation, the Board of Trustees shall elect trustees, after considering the nominees submitted by the Governance Committee, to succeed the trustees whose terms are then expiring or to fill a partial term in order to maintain a balance of the classes. The election of trustees shall be subject to ratification by the Federation. A failure of Federation to formally ratify the election within sixty (60) days of receiving notice of the election of new trustees shall be deemed approval of such election. Corporate action taken by the Board of Trustees during the sixty (60) day period after the election shall be valid notwithstanding the requirement of ratification by Federation.

The term of a trustee shall begin at the close of the annual meeting at which he or she is elected and shall continue until the close of the third annual meeting next succeeding the trustee's election and, unless a reduction in the size of the Board results in no successor being elected, until his or her successor is elected and qualified.

Section 3.4. Limitation on Terms. A trustee may serve a maximum of two consecutive three-year terms, and shall be eligible for re-election to the Board of Trustees after a hiatus of at least one year. If, upon the expiration of a trustee's second consecutive three-year term, the trustee is serving as Chair, Vice Chair, Secretary or Treasurer of the Foundation (or is nominated to serve or continue to serve in either office), then, in such event, the term of the trustee shall expire upon the conclusion of such person's term of office. Notwithstanding the above, no trustee shall serve more than twelve years in the aggregate; provided, however, that upon the completion of his or her term of office, the outgoing Chair shall be immediately eligible for nomination for a one-year term as a trustee.

Section 3.5. Resignation of Trustees. The written resignation of a trustee shall be effective upon its delivery unless the notice specifies a later date acceptable to the Foundation.

Section 3.6. Removal of Trustees. A Trustee may be removed by the affirmative vote of two-thirds of the then serving Trustees, provided that prior written notice of the meeting at which such action is to be taken shall have been sent to the Trustees.

Section 3.7. Vacancies. In case of any vacancy in the Board of Trustees caused by death, resignation, or otherwise, the remaining trustees, by a majority vote, may fill such vacancy for the unexpired portion of the term, even though such remaining trustees constitute less than a quorum, though the number of trustees at the meeting is less than a quorum, and though such majority is less than a quorum. Service for an unexpired term shall not count towards the two consecutive three-year term or twelve-year maximum lifetime term limits.

Section 3.8. Life Trustees. Notwithstanding the term limitations set forth in section 2.4, the Board of Trustees at its annual meeting may elect honorary Life Trustees, who may serve for their lifetimes. The number of Life Trustees shall not exceed 5.

Nominations for the election of Life Trustees shall be made by the Board of Trustees from those former trustees who have exhibited outstanding qualities of leadership and dedication to the Foundation and the Greater Hartford Jewish community, as determined in the sole discretion of the Board of Trustees.

Life Trustees shall be invited to attend and participate in deliberations of the Board of Trustees at its regular meetings, but they shall not be counted toward a quorum at meetings nor shall they be entitled to vote. They shall undertake such activities and shall have such other duties as shall be determined by the Chair from time to time.

Section 3.9. Compensation. No trustee shall receive compensation for services rendered to the Foundation in such capacity, but trustees shall be entitled to reimbursement for reasonable and necessary expenses actually incurred in connection

with the performance of their duties, and, subject to the Foundation's conflicts of interest policy, may receive reasonable compensation for services performed in other capacities for or on behalf of the Foundation.

ARTICLE IV. MEETINGS OF TRUSTEES

Section 4.1. Regular and Special Meetings. Regular meetings of the Board of Trustees shall be held at least four (4) times each year at such times and places as the Board of Trustees shall from time to time determine. Special meetings of the Board of Trustees may be held whenever the Chair or a majority of the Board of Trustees may deem it advisable, upon at least two days written notice, unless otherwise provided in these bylaws, and shall be called by the Chair within 14 days of receipt of a written request of a majority of the Board of Trustees.

Section 4.2. Annual Meetings. Annual meetings of the Foundation shall be held within three months after the close of the Foundation's fiscal year, at such time and place as the Chair shall designate, for the purpose of electing trustees and officers for the ensuing year, appointing committees and transacting such other business relating to the affairs of the Foundation as may properly come before the meeting.

Section 4.3. Quorum and Vote Required for Action. At all meetings of the Board of Trustees, a quorum shall consist of a majority of the trustees then in office. Except as otherwise provided by law, by the Foundation's Certificate of Incorporation or by these bylaws, the affirmative vote of a majority of the trustees present when a quorum is present shall constitute the act of the Board of Trustees.

Section 4.4. Action Without a Meeting. If all trustees having a right to vote consent in writing (including without limitation by any lawful electronic means) to any action taken or to be taken by the Foundation, the action shall be as valid as if it had been authorized at a meeting duly called and held of the Board of Trustees, and such written consent or consents shall be filed with the corporate records.

Section 4.5. Participation through Other Means of Communication. A trustee may participate in a meeting of the Board of Trustees by any means of communication by which all trustees participating may simultaneously hear one another during the meeting. A trustee participating in a meeting in this manner shall be deemed to be present in person at such meeting.

Section 4.6. Notice and Waivers of Notice. Notice given in accordance with these bylaws may include notice by any electronic means. A trustee may waive any notice of a meeting before or after the time stated in the notice. The waiver shall be in writing, signed by the trustee entitled to the notice and filed with corporate records. In addition, a trustee's attendance at or participation in a meeting shall constitute a waiver by such trustee of notice of the meeting unless the trustee, at the beginning of the

meeting, or promptly upon his or her arrival, objects to holding the meeting or transacting business at the meeting and does not thereafter vote for or assent to action taken at the meeting.

ARTICLE V. OFFICERS

Section 5.1. Officers. The officers of the Foundation shall be a Chair, one or more Vice Chairs, a President, a Secretary, a Treasurer, and such other officers as the trustees may from time to time deem necessary or desirable. Any two or more offices may be held by the same person, except that the person serving as Secretary may not also serve as either the President or Chair. Each officer shall perform such other duties as may be assigned to him or her, or specifically required to be performed by him or her, by these bylaws, by the Board of Trustees or by the Chair. Except as otherwise permitted under the Act, in the event of an emergency between regular meetings of the Board of Trustees and if a quorum for a special meeting of the Board of Trustees cannot be achieved, then a majority of the then serving officers may take action.

Section 5.2. Election, Term of Office and Vacancies. The officers of the Foundation, except for those officers, if any, who may be paid employees of the Foundation, shall be elected by the trustees from among their number. Officers shall hold office for two-year terms beginning at the close of the annual meeting at which they are elected and ending at the close of the second succeeding annual meeting, and until their successors have been elected and qualified. In no event shall the Chair serve in office for more than three consecutive two-year terms. Vacancies may be filled or new offices may be established and filled at any meeting of the Board of Trustees.

Section 5.3. Chair. The Chair shall preside at all meetings of the Board of Trustees and perform such duties as may be assigned by the Board of Trustees. The Chair shall be an *ex-officio* voting member of all committees.

Section 5.4. Vice Chair. It shall be the duty of a Vice Chair, in the absence or disability of the Chair, to perform the Chair's duties. In the event there are two or more Vice Chairs, the trustee most senior in board service serving as Vice Chair shall carry out the Chair's duties.

Section 5.5. President. The President shall be the Chief Executive Officer of the Foundation and an employee of the Foundation. The President shall generally supervise, direct and control the business of the Foundation, subject to the control of the Board of Trustees. The President shall be responsible for implementing or causing to be implemented the resolutions, actions and policies of the Board of Trustees and for consulting with and advising the Board of Trustees with respect to the achievement of the mission of the Foundation and the conduct and management of the affairs of the Foundation. The President shall not be a member of the Board of Trustees, but shall be

present at Board meetings in an informational and advisory capacity, unless otherwise directed by the Board of Trustees.

Section 5.6. Treasurer. The Treasurer shall serve as the Chair of the Finance Committee and make a report at each regular Board meeting regarding the finances of the Foundation. S/he shall oversee the annual budget preparation process, present the budget to the Board of Trustees for approval and provide general oversight of the fiscal policies and procedures of the Foundation.

Section 5.7. Secretary. It shall be the duty of the Secretary to ensure that accurate minutes of all meetings of the Board of Trustees are taken and approved; that proper notice is given of all meetings of the Board of Trustees; that records of the Foundation are maintained as required by law and made available when required by authorized persons; and, in general, to perform all the duties incident to the office of Secretary.

Section 5.8. Removal. The Board of Trustees, may, by the affirmative vote of a majority of the then serving trustees, remove any officer of the Foundation from office at any time, with or without cause, regardless of the term for which such officer may have been elected or appointed, but without prejudice to an employee/officer's contract rights, if any.

Section 5.9. Resignation. The written resignation of an officer shall be effective upon its delivery unless the notice specifies a later date acceptable to the Foundation.

ARTICLE VI. COMMITTEES OF THE BOARD

Section 6.1. Creation. The Board of Trustees may designate any two or more trustees and other persons to constitute such standing or ad hoc committees as it believes are necessary and prudent for the management of the business and affairs of the Foundation. A chair of each committee shall be selected by the Chair of the Foundation and shall serve at the pleasure of the Chair of the Foundation.

Committees shall have such functions and may exercise such power of the Board of Trustees as may be delegated under the Act or as may be provided in these bylaws or in the resolution or resolutions creating such committee or committees. The Board may abolish any committees, including ones established under these bylaws, and may alter the functions and power of any committees.

The creation of such Committee or committees shall not operate to relieve the Board of Trustees, any individual trustee, or the officers of any responsibility imposed on such persons by law.

The Board of Trustees shall have the following standing committees: Audit Committee, Finance Committee, Investment Committee, Grants Committee, Governance Committee and such other committees as may be created in accordance with these bylaws.

Section 6.2. Audit Committee. The Audit Committee shall be responsible for the oversight of the: (1) safeguarding of assets; (2) quality and integrity of accounting; (3) reporting and internal control practices; and (4) independent audit of the Foundation. It shall recommend to the Board of Trustees the engagement of the Foundation's independent auditors, discuss with the independent auditors their audit procedures, including the proposed scope of the audit, the audit results and the accompanying management letter and, in connection with determining their independence, review the services performed by the independent auditors. The Audit Committee shall also ensure evaluation of the risk faced by the Foundation, assess its control objectives and whether these objectives have been met, receive risk assessments from the independent auditors and from management, and obtain from the independent auditors and management an understanding of the key control issues facing the Foundation and monitor progress on those issues.

Section 6.3. Finance Committee. The Finance Committee shall be responsible for the overall direction and control of the finances of the Foundation, including the preparation of the annual budget, a quarterly review of operating and capital revenues and expenses and a review of sources of funds.

Section 6.4. Investment Committee. The Investment Committee shall be responsible for the investment of the assets held by the Foundation in accordance with such policies as may be adopted by the Board of Trustees from time to time. The Investment Committee shall review investment reports at least quarterly, review investment policies and procedures, make recommendations to the Board concerning changes to such policies and procedures, and authorize investments in accordance with Board policies and procedures. The Investment Committee shall report on its activities at regular Board of Trustees meetings.

The Investment Committee may retain and discharge corporate fiduciaries and professional investment advisors, consultants and managers.

Section 6.5. Governance Committee. The Governance Committee is responsible for identifying and nominating qualified trustee candidates for election to the Board, assessing the participation and engagement of trustees and developing and reviewing succession plans for trustees, officers and executive staff. In addition, it shall monitor all matters involving corporate governance, oversee compliance with ethical standards and make recommendations to the Board of Trustees on governance matters. The Governance Committee shall meet at least two times each year.

Section 6.6. Grants Committee. The Grants Committee shall recommend to the Board of Trustees grants to be awarded from unrestricted funds of the Foundation through a competitive grants process. As part of its deliberations, the Grants Committee shall consider community funding priorities, if any, established from time to time through a collaborative process involving the Foundation and Federation.

Section 6.7. Terms. Except as provided in the remaining provisions of this section, a committee member shall serve for a period of three years commencing at the close of the meeting at which the member is appointed. There shall be no maximum term limit or a hiatus requirement.

A new Committee member appointed to replace a former member whose term was not completed shall initially serve during the remaining term of the former member.

Section 6.8. Meetings. Each committee shall meet with sufficient frequency to accomplish its assigned functions.

Section 6.9. Quorum. A majority of the members of each Committee shall be necessary to constitute a quorum.

Section 6.10. Manner of Acting. The vote of a majority of the members of a committee present at any meeting at which there is a quorum shall be the act of such committee.

Section 6.11. Minutes. Each Committee shall keep regular minutes of its proceedings and report its activities and recommendations to the Board of Trustees.

ARTICLE VII. MANAGEMENT AND DISTRIBUTION OF FUNDS

Section 7.1. Acceptance of Gifts. The Chair, Vice Chair(s) or President shall have the power to accept gifts and transfers of property to the Foundation and any one of them shall be empowered to sign gift instruments including trust agreements in the name of and on behalf of the Foundation subject to policies, guidelines and procedures adopted by the Foundation from time to time.

The Foundation may accept property subject to gift instruments that impose no restriction on use, that designate that the income or assets are to be used for one or more public charities, or used for specific charitable purposes, or that designate the donor or another person to have advisory privileges with respect to charitable distributions. It may also accept charitable funds transferred from organizations described in section 501(c)(3) of the Code with purposes consistent with those of the Foundation. The Foundation may categorize such gifts into fund types based on restrictions on use or as may be prescribed by applicable law or nonprofit organization or community foundation best practices.

Section 7.2. Commingled Assets. Assets of the Foundation whether allocated to a specific fund or to a general fund, or held as a custodian or trustee, may be commingled for purposes of investment and management or retained in the form in which originally contributed or acquired. Accurate records shall be kept of the allocable share of earnings, realized and unrealized gains and losses of each of the funds held by the Foundation, and additions to and disbursements from each of such funds and trusts.

Section 7.3. Spending Policy. The Foundation shall follow a spending policy established by the Board of Trustees from time to time that is designed to lessen the risk that the real value of the Foundation's assets will be eroded by inflation over time and to ensure that the amount of funds available to carry out the Foundation's charitable purposes as a result of its investments is insulated from fluctuations in rates of return.

The trustees in their discretion may alter the amount paid or committed for charitable grantmaking and operating expenses by the application of the spending policy in effect from time to time to prevent distortions resulting from extraordinarily large gifts or distributions during the period used in calculating the amount available for spending or arising from other causes.

Section 7.4. Distribution of Net Income. As used in these bylaws, the term "net income" shall mean the amount that may be distributed under Foundation's spending policy in effect from time to time.

The Board of Trustees shall determine grants to be awarded and paid from the net income of unrestricted funds. No such grants shall be made unless notice of the meeting describing the grants to be considered shall be given prior to the meeting at which they will be considered. The Board of Trustees shall award grants from all other funds in accordance with the terms of the instruments governing such funds.

Section 7.5. Distribution in Excess of Net Income. The Board of Trustees may make distributions in excess of net income from unrestricted funds held by the Foundation, with approval of such distributions to be made in the following manner:

(a) By the affirmative vote of two-thirds of the then serving trustees, the Board of Trustees may authorize distributions in excess of net income in any one year not to exceed, in the aggregate, 10% of the value of the assets comprising the unrestricted funds held by the Foundation at the time; and

(b) By the affirmative vote of three-fourths of the then serving trustees, and the approval of the Federation, the Board of Trustees may authorize distributions in excess of net income in any one fiscal year not to exceed, in the aggregate, 25% of the value of the assets comprising the unrestricted funds held by the Foundation at the time.

ARTICLE VIII. GENERAL MATTERS

Section 8.1. Fiscal Year. The fiscal year of the Foundation shall end on June 30, unless the Board of Trustees designates otherwise.

Section 8.2. Reports. Summary reports of Foundation investments, revenues, additions and disbursements shall be prepared and submitted to the Board of Trustees at each regular meeting. A report of the Foundation's progress shall be given at the annual meeting of the Federation.

Section 8.3. Annual Audit. An annual financial statement audited by a certified public accountant shall be prepared as soon as practicable after the end of the Foundation's fiscal year. The Foundation shall provide the Federation with a copy of its audited financial statement on an annual basis.

ARTICLE IX. INDEMNIFICATION

The Foundation shall indemnify trustees, officers, employees and agents of the Foundation to the fullest extent permitted by law, including, without limitation, section 33-1116 et seq. of the Connecticut General Statutes. In addition, the Foundation may advance expenses to the fullest extent permitted by law to such persons for the purpose of paying legal expenses in the defense of any claim for which indemnification may be available, and may purchase and maintain insurance to provide such persons greater indemnification than that permitted by law.

ARTICLE X. CONFLICTS OF INTEREST

The Foundation shall adopt a policy addressing potential conflicts of interest on the part of its trustees, committees and staff.

ARTICLE XI. AMENDMENTS

The Board of Trustees, with the approval of the Federation, may alter, amend or repeal any or all of the provisions of these bylaws by the affirmative vote of two-thirds of the then serving trustees, provided that prior written notice of the meeting at which such action is to take place shall have been sent to the trustees, and provided further that no bylaws provision prescribing the vote required for a specific action shall itself be amended by a lesser vote.

Adopted by the Board of Trustees
On _____



Code of Ethics Conflict of Interest Policy

I. Code of Ethics

The Jewish Community Foundation (the Foundation or JCF) is responsible for the stewardship of resources of the Greater Hartford Jewish community and believes it should be held accountable for the use of community resources it is privileged to hold. As such, the Foundation believes as a fundamental principle that the organization should adhere to the highest ethical standards.

Any code of ethics must be built on a foundation of shared values. JCF values:

- Accountability and transparency
- Openness, honesty, trust, and integrity,
- Innovation and excellence,
- Diversity and inclusiveness, and
- Respect, fairness and justice

These values inform and guide the actions that the Foundation should take in developing policies and informing our daily practices. Our code of ethics includes the following:

Personal and Professional Integrity – Foundation staff, board members and volunteers shall act with honesty, integrity and openness in all their dealings as representatives of the organization. The Foundation promotes a working environment that values respect, fairness and integrity.

Legal Compliance – The Foundation will be diligent in compliance with laws, regulations and applicable conventions that govern and regulate our organization.

Inclusiveness and Diversity – The Foundation shall have a policy of promoting inclusiveness including a commitment to inclusiveness in hiring, retention, promotion and board recruitment.

Information Confidentiality - The need for a free and open internal discussion of all activities of the Foundation, as well as the possibility that activities of the Foundation may impact other organizations, require that confidential information received as a Board or committee member or as a member of the Foundation's staff be kept confidential and not disclosed to others.

Stewardship and Conduct – The Foundation shall manage its funds responsibly and prudently and all Board members, staff and volunteers will act at all times in accordance with the highest ethical standards and in the best interest of the Foundation, its donors, constituents, and organizational reputation.

Ethical and responsible behavior requires that each individual exercise sound independent judgment. It is expected that Board and committee members, as well as employees, will be guided by these ethical standards in making the right choices regarding matters that may be encountered when engaging in activities that could reflect on the Foundation.

II. Conflicts of Interest Policy

The Jewish Community Foundation is committed to fairness and transparency in the conduct of all of its activities. The Foundation recognizes that its Trustees, committee members and employees will involve themselves with organizations, charitable causes and other endeavors which may intersect with the affairs of the Foundation. This means that, from time to time, potential conflicts of interest, or the appearance of such conflicts, will inevitably arise. It is the Foundation's policy to deal with such conflicts in an open and appropriate manner.

This conflict of interest policy requires disclosure of financial and other interests and mandates abstention from decision-making actions when a potential for conflict exists. Since the appearance of bias or conflict can be as damaging to the Foundation as the existence of an actual conflict, these principles are intended to preclude any such appearance of conflict.

This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to charitable organizations, specifically including sections 33-1127 to 33-1130 of the Connecticut Revised Nonstock Corporation Act concerning "Director's Conflicting Interest Transactions."

(1) Potential Conflicts. Trustees, committee members and staff members and members of their families associated with the Foundation must be alert to situations in which a conflict or potential conflict of interest could arise. These situations may be ones in which the individual is in a position to benefit personally, either directly or indirectly, or is in a position of serving interests that compete with the best interests of the Foundation. Affiliations that could lead to conflicts of interest include, but are not limited to, serving as a board member, committee member or employee of a current or potential grantee (other than the Jewish Federation of Greater Hartford), vendor or service provider, or doing business with a current or potential grantee, service provider, or vendor.

(2) Duty to Disclose. Trustees, members of committees and employees of the Foundation are expected to fairly and fully disclose any affiliation they or family members have which could affect their ability to fulfill their role in the affairs of the Foundation in an impartial manner. For this purpose, the term "family member" includes a spouse or domestic partner, parents, siblings, children and grandchildren, and the spouses or domestic partners of children, grandchildren and siblings.

Disclosure of any affiliations that could lead to a conflict or appearance of a conflict should be made *prior to* any discussion of the matter under consideration. Once such disclosure has been made, the Chair of the Board, committee chair or President, as may be appropriate, will determine whether or not an actual or apparent conflict of interest exists.

Appropriate disclosures of affiliations of Trustees, committee members and staff members or members of their families with any prospective grantee, service provider or vendor will be incorporated into relevant Board or committee meeting minutes.

(3) Abstention from Foundation Decision Making. In any situation in which a conflict of interest or appearance of conflict exists, the disclosing Trustee, committee member or employee shall abstain from voting and shall not participate in the discussion of the matter under consideration

other than to answer specific questions that may be raised by others at the meeting. The abstention shall be formally noted in the Foundation's minutes. The Board or committee, in the sole discretion of a majority of its members present at the meeting, shall have the right to review and discuss the matter without the affected individual being present.

(4) No Material or Financial Benefit. The Foundation shall pay no more than fair market value for services or property provided by an employee, other service provider or vendor. Incidental and intangible benefits to persons affiliated with the Foundation, such as name recognition or public acknowledgment, are permitted.

The Foundation will not customarily make grants to, or contract with, organizations which employ affiliated persons. The President, with the concurrence of the Chair of the Board of Directors, may approve exceptions to this policy when the work of the Foundation will be furthered by such actions or where the grant or contract will not affect the job or compensation of the affiliated person in question. No significant personal benefit of any nature may be derived by any affiliated person from any such organization.

(5) Investment Activities. Trustees, committee members and staff members and members of their families associated with the Foundation's investment activities have a paramount obligation to make all decisions affecting investments solely on the basis of the Foundation's best interests. This requires that they be alert to situations in which a conflict or potential conflict of interest could arise and apply the strictest ethical standards in determining whether such a conflict exists and resolving any real or apparent conflicts.

To make such scrutiny possible, Trustees, committee members and staff members are required to promptly disclose to the President any present or past business connections they or their family members have or have had with any present or proposed manager of the Foundation's assets or any other organization or individual with which the Foundation has, or considers having, an investment relationship. Such disclosure is not necessary when the relationship with an investment manager is purely through ownership of shares in a public mutual fund managed by the firm in question, where such shares constitute less than 2% of the total outstanding shares. Trustees, committee members and staff members shall not wrongfully use or disclose confidential investment information obtained in the course of Foundation business.

(6) Annual Disclosure Statements. The Foundation will annually distribute to each Trustee, committee member and staff member a form for listing the nonprofit and for-profit organizations with which such person and members of his or her family are affiliated, as well as certain financial relationships. Each Trustee, committee member and staff member is responsible for completing and updating these annual disclosure statements and returning them to the Foundation office. Those having no such affiliations need only affirm this fact on the annual disclosure statement.

III. Compliance Policy (sometimes referred to as the "whistleblower" policy)

The Jewish Community Foundation of Greater Hartford (JCF) is committed to lawful and ethical behavior in all of its activities and requires Board members, committee members and employees to conduct themselves in a manner that complies with all applicable laws and

regulations. This Policy is intended to encourage employees and others to raise serious concerns without fear of retaliation in any form.

(1) Reporting. Trustees and committee members who believe that someone has violated the Foundation's conflict of interest policy or has engaged in illegal activity should promptly express their concern to the Chair of the Audit Committee or to the Chair of the Board of Trustees. Staff should promptly report the issue to the Foundation's President. If management is unresponsive or has itself violated the policy or engaged in suspected illegal activity, staff should report their concerns directly to the Chair of the Foundation's Audit Committee.

(2) Investigation and Confidentiality. The Foundation will thoroughly investigate reports of violations or suspected illegal activity, and all those involved are required to cooperate with such investigations. The Foundation will act as discreetly as reasonably possible, providing information on a "need to know basis." The Foundation will promptly take corrective action if it concludes that there is a problem after completing its investigation.

(3) Procedures to manage conflicts. When a potential conflict of interest is disclosed to the Chair of the Audit Committee, the Chair of the Board of Trustees or the President, steps will be promptly taken to determine whether a conflict exists, and whether to: (1) take no action; (2) assure full disclosure to the Board, committee or others; (3) ask the individual to recuse him/herself from participation in discussions or decision making concerning the matter at hand; or (4) ask the individual to resign from his or her position or, if the individual refuses to resign, initiate possible removal in accordance with the Foundation's bylaws.

The Foundation's President and Vice President Finance will make reasonable efforts to monitor proposed or ongoing transactions for conflicts of interest and disclose them to the Chair of the Audit Committee and Chair of the Board of Trustees in order to deal with potential or actual conflicts, whether discovered before or after the transaction has occurred.

(4) No Retaliation. The Foundation will not discharge or discriminate against any individual for allegations made in good faith or for participation in any investigation.

- a) **Employees** – The Foundation will strongly discipline any employee who threatens or retaliates against such individuals who have made such allegations. Staff should act reasonably and in good faith during any complaint and investigation process.
- b) **Volunteer Leaders** – For any volunteer who threatens or retaliates against an individual (professional employee or volunteer) for making allegations in good faith or for participating in any investigation it will be considered grounds for removal from their position as Trustee, Committee Chair or Committee member.

(5) Compliance Officer. The Foundation's President is the compliance officer and is responsible for policing and enforcing the code of ethics and related conflict of interest policy. Should the Foundation's Board of Trustees deem, in its sole discretion, that s/he is compromised in fulfilling his/her duties, the Chair of the Audit Committee will serve as compliance officer.

(6) Discipline. Violating Foundation policies or engaging in illegal activity may lead to discipline up to and including immediate termination of employment.

IV. Annual Review of Activities

To ensure that the Foundation operates in a manner consistent with its charitable purposes and that it does not engage in activities that could jeopardize its status as an organization exempt from federal income tax, periodic reviews shall be conducted. The annual review shall include, at a minimum, the following subjects: (1) whether the Foundation provided personal loans to Trustees or employees; (2) whether compensation arrangements and benefits are reasonable and the result of arm's length transactions; (3) whether agreements for services, property, facilities, etc. are reasonable and the result of arm's length transactions; and (4) whether agreements for services, property, facilities, etc. further the Foundation's charitable purposes and do not result in inurement or impermissible private benefit.

This Code of Ethics and Conflict of Interest Policy was approved on December 31, 2005 and most recently amended on June 7, 2013.

S:\WORD\Policies - Board established\Conflict of Interest\Code of Ethics - Conflicts of Interest policy approved 3-16-2010.doc

JCF Committees FY2021

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Adam Greene
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Eric Maurer
Matt Cooper
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Elana MacGilpin (Staff)

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Ted Kaplan
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Michelle Boxer
Lauri Miller
Beth Papermaster
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Jacob Schreiber (Staff)



**BOARD OF TRUSTEES AND OFFICERS
2020-2021**

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Jacob A. Schreiber, President & CEO 77 Sylvan Ave. West Hartford, CT 06107 <i>cell</i> 913.378.4227 <i>e-mail</i> jschreiber@jcfhartford.org	Jewish Community Foundation 333 Bloomfield Avenue, Suite D West Hartford, CT 06117 <i>ph</i> 860.523.7460 <i>fx</i> 860.231.0576 <i>e-mail</i> jschreiber@jcfhartford.org
<i>Please continue to next page</i>	
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Messaging Toolkit

The Marketing Department conducted one-on-one discussions with select Lay Leaders, employees and Board Members regarding strategic communications for the Foundation. During these discussions, our stakeholders asked for help in explaining to their peers the Foundation's unique products and services. As a result, the Marketing Department is drafting a Messaging Toolkit, a series of documents that will empower stakeholders to accurately promote and increase awareness about the Foundation. This toolkit offers messages in a friendly, conversational tone with examples of donor impact.

The draft messaging toolkit will be presented at the September 2020 Board of Trustees meeting includes the following elements:

- ✓ Elevator speech with examples
- ✓ Federation and Foundation Collaborative Partnership
- ✓ Examples of funds followed by fund descriptions
- ✓ Admin Fee explanation and schedule
- ✓ Description of Giving Circles

JCF's final messaging toolkit will be published and distributed to the Board of Trustees by winter 2020.

If you have questions or comments about this messaging toolkit, we'd love to hear from you. Please contact Maureen O'Connell, Marketing Director, by email: moconnell@jcfhartford.org, or by cell phone: 857.636.0938.

**Elevator Speech:**

The Jewish Community Foundation of Greater Hartford offers a personalized experience in philanthropy with a range of options. We help people identify their philanthropic goals to create lasting impact.

People start a charitable fund with us. We invest these funds so that they grow and continue to support the causes donors love today and for generations to come.

Whether you want to feed the hungry, educate kids, protect our seniors or support the arts, the Foundation can help you realize your philanthropic goals.

Supporting points:

- Over the past five years, the Foundation's funds have grown from \$80 million to \$120 million.
- We grant \$4.5 million a year: \$3 million of that is invested in the Greater Hartford Jewish Community – including \$1 million to the Jewish Federation to support immediate community needs – and \$1.5 million goes to impact both Jewish and general causes in the United States and around the world.

Examples of giving:

- Frank Kavitsky passed away in 1998 and left part of his estate to the Jewish Community Foundation. Since he left this remarkable gift of \$1.2 million, the fund has granted nearly \$1 million to the Jewish Federation (an average of about \$50,000 per year). Today, the total fund balance stands at \$1.5 million, demonstrating the power and sustainability of endowment. We may not have met Frank, but his legacy lives on through his visionary, perpetual investment to the continuity of our Jewish Community.
- Holocaust survivors Leizor and Barbara Kessel created a higher education scholarship fund to benefit Jewish students from Greater Hartford. The couple left their condo, personal property and part of their estate for the scholarship. Leizor and Barbara passed away in 1995 and 1998 respectively. The Kessels' fund has helped 135 students in the past 20 years, granting out more than \$550,000...and their fund balance is \$1.1 million. The couple's generosity keeps our community thriving – now and always.



Collaborative Messaging & Leadership Roles

The Jewish Community Foundation and the Jewish Federation share a common vision: ensuring a vibrant Jewish community now and for generations to come. They achieve this vision through collaborative planning, joint philanthropic initiatives, complementary approaches to community building, and assuming distinct community leadership roles.

The Jewish Community Foundation is a partner, educator, and leader in cultivating philanthropy among individuals and families.

- The Foundation works with individual donors to help them achieve their philanthropic goals, while building a permanent pool of charitable dollars to secure the long-term future of the Jewish community. Our endowment funds, donor-advised funds and legacy giving programs honor donors' intentions and support the needs of Jewish agencies and synagogues and a variety of other nonprofits.
- The Foundation grants \$4.5 million a year. \$3 million of that is invested in the Greater Hartford Jewish community, including \$1 million to the Jewish Federation to support immediate community needs. The remaining \$1.5 million impacts both Jewish and general causes in the United States and around the world.

The Jewish Federation is the lead planner, voice, and convener of Greater Hartford's Jewish community. Its programs and annual fundraising campaign help power our Jewish community while promoting communal understanding and action through Jewish values.

- The Federation's Annual Campaign generates approximately \$4.3 million per year. The campaign provides essential support to 20-plus local Jewish organizations and 10-plus organizations that operate in Israel and overseas.
- The campaign also supports Federation's unique programs and services in Greater Hartford, including community-wide security initiatives, building interfaith alliances to combat anti-Semitism and other forms of bigotry, and preparing tomorrow's Jewish leaders and teachers.

The following chart provides a snapshot of how the Foundation and Federation work to sustain a strong Jewish community in perpetuity.

Leadership Roles	Jewish Community Foundation of Greater Hartford	Jewish Federation of Greater Hartford
Shares a common vision for building a vibrant Jewish community now and for generations to come	X	X

Awards grants to address immediate community needs	X	X
Helps donors create charitable funds to support their favorite causes - now and forever	X	
Manages endowed funds to support the long-term vibrancy of Jewish organizations	X	
Mobilizes hundreds of volunteers to raise funds and take actions that benefit the Jewish community		X
Serves as the lead planner, voice, and convener of Greater Hartford's Jewish community		X
Promotes enrollment and participation in Jewish education on behalf of students, parents, institutions, and educators		X
Counsels organizations on building their legacy and endowment programs	X	
Serves as a partner, educator, and leader in cultivating philanthropy among individuals and families	X	X
Conducts community leadership trainings		X
Manages two giving circles: one for young professionals and one for women	X	
Strengthens local Jewish organizations through strategic grants that promote capacity building and innovation and address critical community priorities	X	X
Offers professional staff who provide donors with a personalized, in-depth philanthropic experience	X	X
Governed by a Board of Trustees/Directors comprised of volunteer lay leaders who provide oversight, counsel, and support	X	X
Offers a variety of ways for community members to deepen their personal Jewish journeys	X	X
Offers business networking opportunities and business partnerships		X
Builds bridges between Jewish and other communities through interfaith and social justice programming		X



GIVE. YOUR WAY.



JEWISH
COMMUNITY
FOUNDATION
OF GREATER HARTFORD

Whatever your charitable aspirations,
the Jewish Community Foundation is your perfect partner.

Begin a family tradition of philanthropy

Involve your children and grandchildren in giving. Work as a family to support causes that matter most to you through a Donor Advised Fund.

Centralize your charitable giving

We handle the record keeping and distributions to nonprofits you want to support. Enjoy online access to your fund and to funding opportunities.

Support your favorite charity

Help agencies, synagogues and other charities that have touched your life. Establish an endowment that will help them now and for generations to come.

Honor a special person

Recognize family milestones and support the Jewish community with a charitable fund whatever the occasion – birthday, bar or bat mitzvah, Jewish holiday, wedding, or memorial.

Meet emerging community needs

Enable the Foundation to respond to urgent local needs and promising opportunities with a Community Action Fund.

Call Kathryn Gonnerman, Vice President of Philanthropy, at 860-523-7460.

Jewish. Community. Forever.



JCF's fees ensure the vitality of the Jewish community – now and forever. Unlike the fees of commercial institutions that focus on their bottom lines and shareholder interests, JCF's fees are invested back into the Jewish community. JCF works in partnership with donors and local grantees to support programs and projects that benefit charities in the Hartford region, throughout the United States, in Israel and around the world. Our services include:

- Providing in-person meetings with the CEO and on-going expert counsel to donors on Jewish philanthropy and other charitable affairs
- Conducting site visits at Jewish agencies to explore specific philanthropic opportunities on behalf of donors
- Awarding grants to Jewish organizations that support their strategic growth
- Helping Jewish agencies and synagogues establish and sustain their endowments

<u>Type of Fund</u>	<u>Administrative Fee</u>
Donor-advised, designated, agency endowment, field of interest or custodial fund*:	<u>1% (first \$1 mil)</u> <u>.9% (\$1 mil to \$2.5 mil)</u> <u>.8% (\$2.5 mil to \$5 mil)</u> <u>.65% (over \$5 mil)</u>
<u>Scholarship Fund:</u>	<u>1.25%</u>
<u>Unrestricted Community Fund:</u>	<u>1.25%</u>

Administrative fees are calculated annually and charged directly to each fund each month.

****How the tiered calculation works:***

For a fund that is \$5,125,000, here's how the tiered calculation would work:

- \$1,000,000 @ 1%
- \$1,500,000 @ .9%
- \$2,500,000 @ .8%
- \$125,000 @ .65%

For a calculated fee rate of .86%

Investment-Related Fees:

Investment fees that JCF incurs in managing the full portfolio of assets are netted out of investment results before fund balances are reported to the donor. We are mindful to keep these fees reasonable.

Administrative fees of the Jewish Community Foundation of Greater Hartford, updated November 2019.

Zachs Campus 333 Bloomfield Avenue, Suite D West Hartford, CT 06117 ph 860.523.7460 fx 860.231.0576 www.jcfhartford.org



Giving Circles

A giving circle is a group of like-minded individuals who donate their time and money to a pooled fund and decide together which organizations and causes will receive their grants. Every voting circle member has an equal voice in these decisions. This model of collaborative grant-making allows members to affect change on social issues and celebrate their positive impact together. Members also attend events that allow them to:

- explore their philanthropic interests
- deepen their knowledge of endowment
- create new friendships

The Jewish Community Foundation of Greater Hartford operates two giving circles, JewGood Hartford and the Lillian Fund, and encourages a gift of \$100 to become a voting member of each giving circle.



JewGood Hartford offers a fun and supportive community for young professionals who want to make a positive impact on the world. JewGood does this through two kinds of activities open to all young professionals - *Hangouts*, which are fun, informal gatherings such as local happy hours, baseball games or backyard BBQs; and *Events*, which blend hands-on volunteer projects with opportunities to learn about local organizations that are making a difference - all while networking with other young professionals. In its inaugural year, JewGood engaged more than 125 participants.



Launched in 1999, the **Lillian Fund** is a giving circle of women who have built an endowment fund of nearly \$285,000. The Lillian Fund envisions a world in which all women and children have equal opportunity for personal and professional achievement. They support this vision by funding children's arts and education programs, domestic violence services, mental health counseling and job training, to name a few. Members view philanthropy through a lens of Jewish values and gender equality, while expanding their impact and deepening friendships.

For more information, visit www.jcfhartford.org and www.jewgoodhartford.org. Follow our giving circles on social media:

@Jewgoodhartford

@Lillianfundjcf



JMAP: Understanding Greater Hartford's Jewish Community, Informing Our Future

- WHAT DO PEOPLE THINK ABOUT JEWISH LIFE?**
 - HOW DO MY OPINIONS COMPARE WITH OTHERS?**
 - ARE COMMUNITY MEMBERS GETTING THE HELP THEY NEED?**
 - HOW HAVE ATTITUDES CHANGED?**
 - WHAT MAKES GREATER HARTFORD UNIQUE?**
-

Get insights into these questions and many more, in this booklet and at:

jMAPCT.ORG

NOTE ON METHODOLOGY

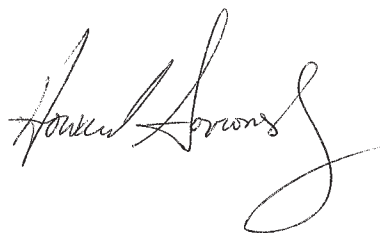
The JMAP study used an “open arms” approach to gather the views of community members. This innovative research methodology allows and encourages as many people as possible in the Greater Hartford area who identify as Jewish, or live in a Jewish household, to participate in the community-wide survey. It yields rich information about the attitudes and behaviors of survey participants, and the large respondent base (n= 1250) allows for deep analysis – looking at various segments of respondents based on demographic, psychographic and attitudinal responses to understand their actions and motivations relative to the Jewish community. This study stands in sharp contrast to traditional demographic studies, which limit participation to a specific number of targeted respondents, gather data primarily through random digit dialed telephone surveys, and focus on providing counts of the number of people who live in a specific area. The study was conducted by The Melior Group.

Inside these pages, you'll find a summary of more than **1.2 million pieces of data**, reflecting the voices of **more than 1,250 study participants** from across the Greater Hartford Jewish community. We hope you'll find JMAP an endless resource to better understand our community and its diversity, uniqueness, and common goals.

This overview is just a slice of the findings. More findings are available online, and even more are in the full database. We hope that you will ponder the data and ask questions; the JMAP team will provide custom reports to answer those questions and help inform your decisions.

The data here offer a snapshot in time, but we are developing a dynamic community dashboard that will help guide us as our community evolves. The dashboard will use the 2016 data as a baseline and a springboard from which to measure our progress and map our future.

Thank you for your contributions to JMAP. We hope that it is a useful tool for the entire community, today and for years to come.



Howard Sovronsky

*CEO, Jewish Federation
of Greater Hartford*



Michael Johnston

*CEO, Jewish Community Foundation
of Greater Hartford*



WHO TOOK THE JMAP SURVEY?

1,251 MEMBERS OF THE
GREATER HARTFORD JEWISH COMMUNITY
RESPONDED TO THE SURVEY

Respondents reflected our diverse community, ranging in age, residence, life experience and perspective.

We had enough respondents in various categories to do statistically significant analysis, available here and online at www.JMAPCT.org.

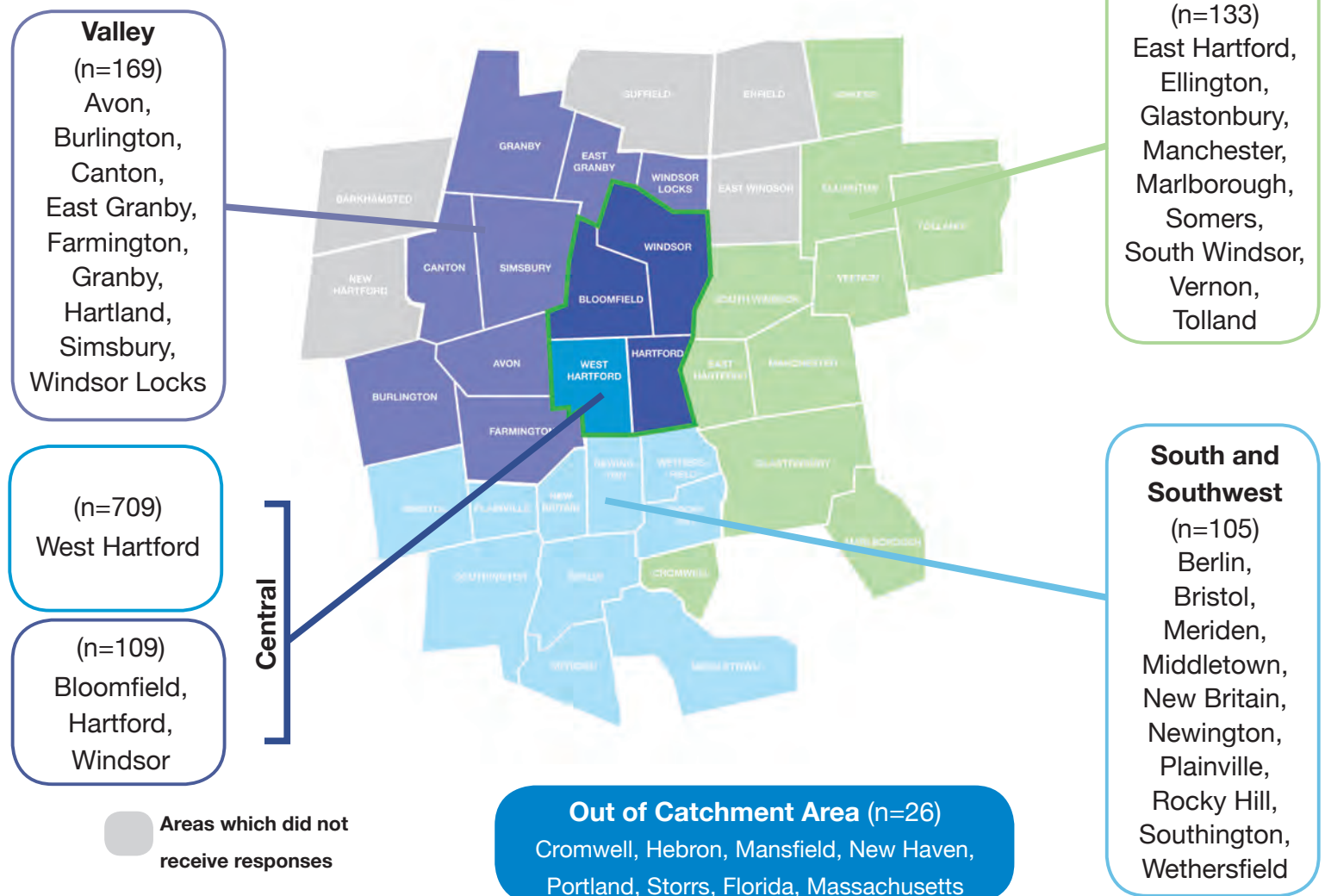


HOW MANY JEWISH PEOPLE LIVE IN GREATER HARTFORD?

Based on national estimates, Census data and other resources, it is estimated that **24,000-28,000** Jewish people live in Greater Hartford.

Where Do the Respondents Live?

THIS MAP REFLECTS THE NEARLY 40 CITIES AND TOWNS THAT MAKE UP GREATER HARTFORD



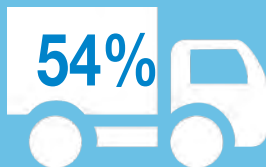
Where Do Age Cohorts Concentrate?

Using data weighting techniques, respondents of different ages were represented in accordance with general population statistics, and each age category was large enough to provide statistically significant data.

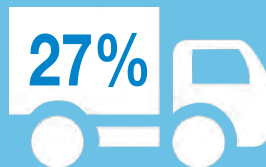
- VALLEY** 49% of respondents are 45-64 years of age
- SOUTH AND SOUTHWEST** 31% of respondents are 18-34 years of age
- EAST OF THE RIVER** 38% of respondents are 45-64 years of age; 20% are 65-74
- CENTRAL**
 - Bloomfield, Hartford, Windsor** 66% of respondents are over age 55
 - West Hartford** 37% of respondents are 45-64 years of age
- 75% of the study's 35-44 year old respondents live in the Central area**



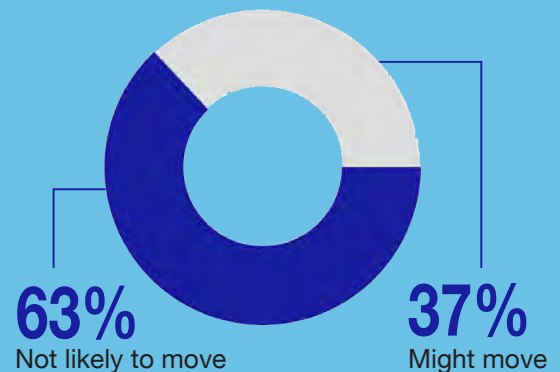
Where Did Respondents Come From, and Where Might They Move?



Most recently moved from another location in Greater Hartford

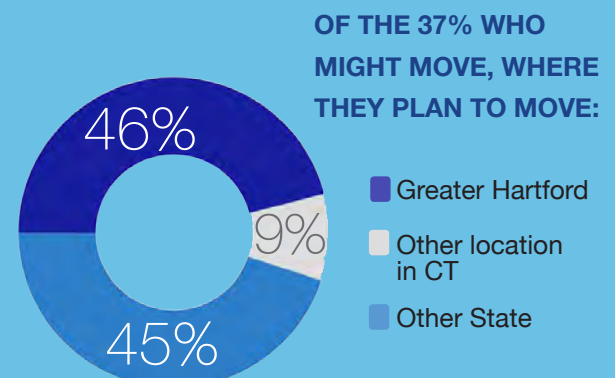


Moved to Greater Hartford from another state or country



37% of respondents might move in the next five years

46% of these respondents plan to move to another location in Greater Hartford



How Do Community Members Feel About Their Participation in Jewish Life?



29% OF RESPONDENTS WOULD LIKE TO PARTICIPATE MORE THAN THEY CURRENTLY DO

This desire for more involvement is strongest among residents outside of the Central areas.

Others who also feel this way tend to be younger (<35), have lower household incomes (<\$50K) and/or are in an interfaith relationship.

TOP 5 CHALLENGES TO PARTICIPATION

- LACK OF TIME
- NO ONE TO GO WITH
- FIND OUT TOO LATE
- TOO EXPENSIVE
- TIMING DOESN'T WORK

THOSE WHO DON'T PARTICIPATE AS MUCH AS THEY WOULD LIKE MOST OFTEN CITE TIME AS A FACTOR

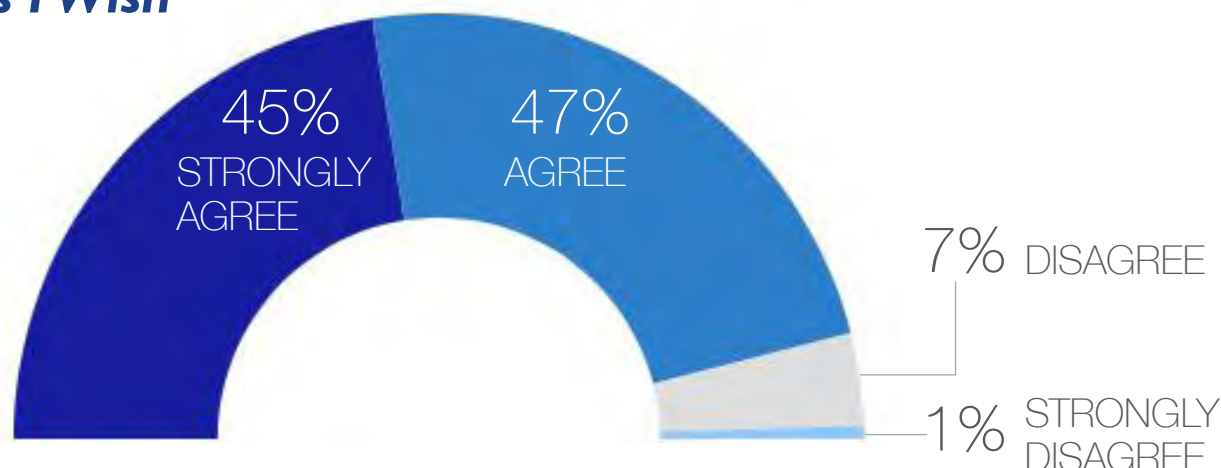


Either they lack time, or the programs/activities/events are not at a good time for them. Not having anyone to go with is another major issue.

- Younger people (<55) are especially sensitive to time-related barriers, while the youngest respondents (<45) are more likely to have social concerns.
- Women are more likely than men to cite cost and “no one to go with” as barriers.

My Community Offers Me the Opportunity to Live My Life as Jewishly as I Wish

(Base: Total Respondents)



What Attitudes and Values Are Important to People?

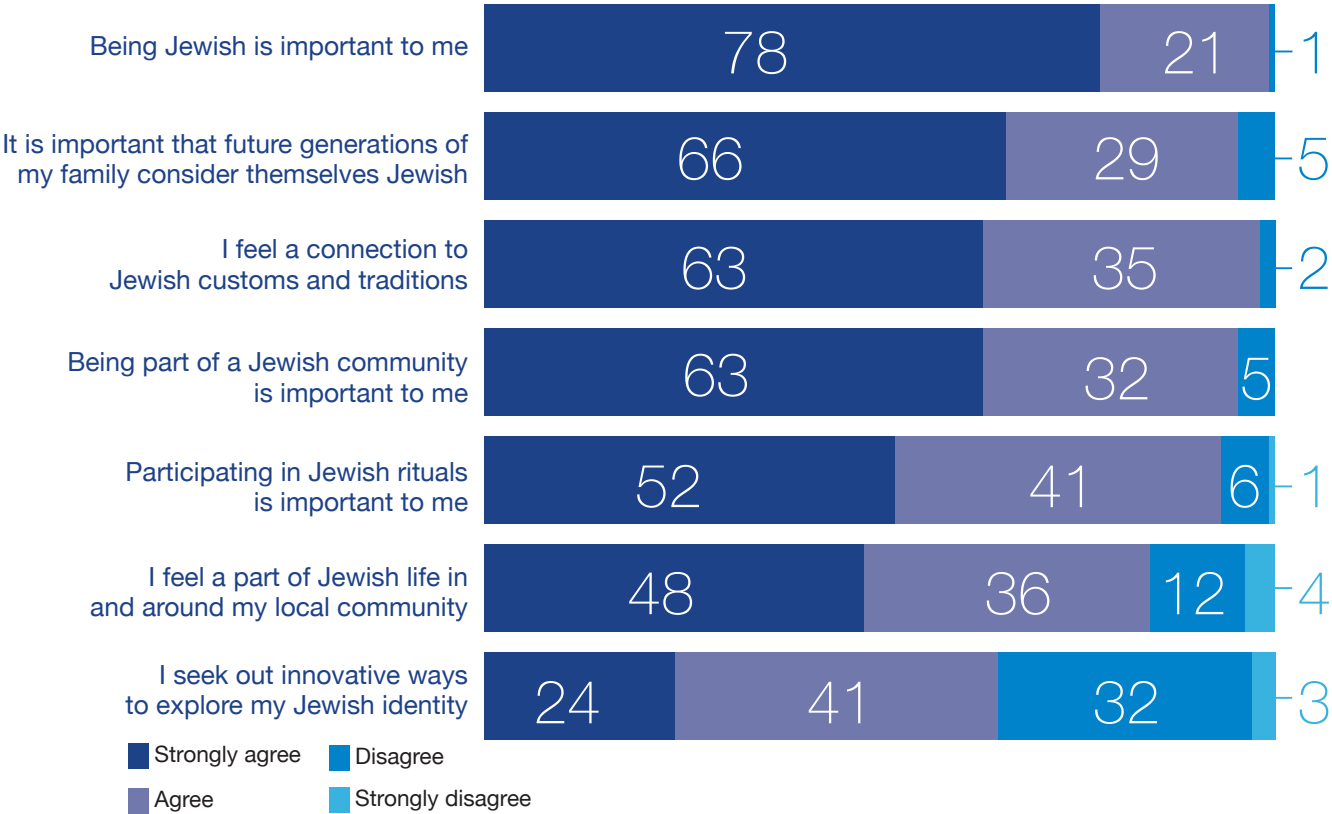
IN GREATER HARTFORD, JEWISH IDENTITY AND JEWISH CONTINUITY ARE STRONGLY HELD VALUES.

97% of respondents agree or strongly agree that being Jewish is important to them, compared to 80% nationally.*

*PEW STUDY

ATTITUDES AND VALUES: JEWISH IDENTITY (%)

(Base: Total Respondents)



How Emotionally Attached Are Community Members to Israel?

(Base: Total Respondents)

- Level of attachment to Israel is evenly divided among respondents who were extremely, very or somewhat attached, with the smallest segment being 10% of respondents who feel no attachment.
- 73% of respondents have traveled to Israel. Of this group, nearly half visited within the past 5 years.
- Those who have been to Israel recently are more likely to feel a stronger emotional connection to Israel.



VOLUNTEERISM AND PHILANTHROPY

How Involved Are Community Members in Volunteering?

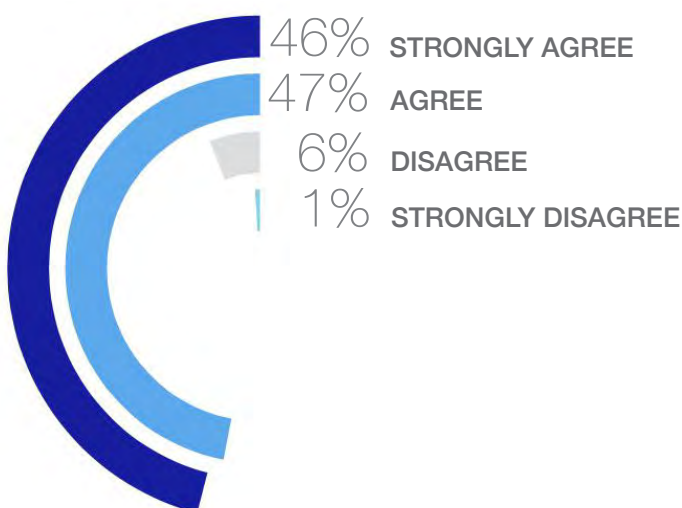


84% OF RESPONDENTS VOLUNTEERED FOR JEWISH OR NON-JEWISH CAUSES IN THE PAST YEAR, MUCH HIGHER THAN NATIONAL AVERAGES.

- Though more people participated in a one-time event than any other way (**58%**), **50%** of people volunteer regularly and **47%** sit on boards or committees, among other activities
- Nearly half (**48%**) of those who “do not participate” in Jewish communal life do not volunteer at all.

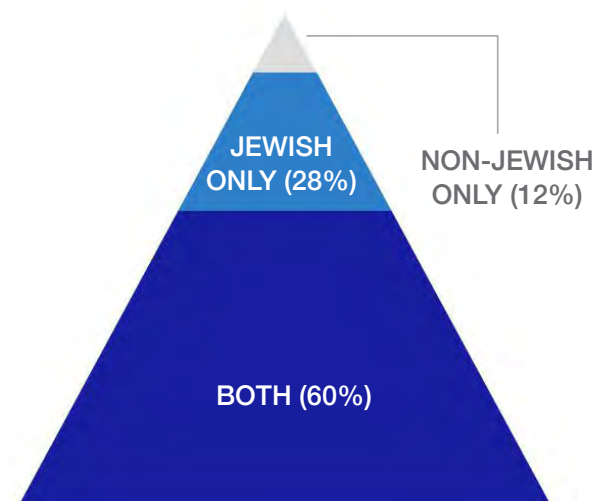
SUPPORTING JEWISH CAUSES IS IMPORTANT

(Base: Total Respondents)



VOLUNTEER INVOLVEMENT BY TYPE OF ORGANIZATIONS/CAUSE (%)

(Base: Respondents who volunteer at all; n=1005)



How Involved Are Community Members in Philanthropy?

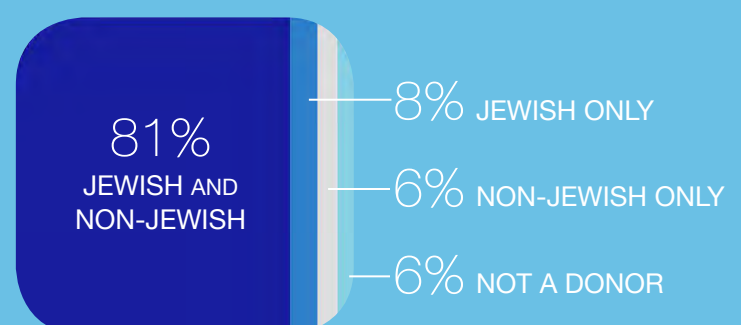
NEARLY ALL RESPONDENTS (94%) DONATED MONEY TO A CHARITABLE ORGANIZATION/CAUSE DURING THE PAST YEAR, COMPARED TO 76% OF JEWISH PEOPLE NATIONALLY*

Most (81%) donated to both Jewish and non-Jewish organizations/causes—with more saying that their giving is weighted toward Jewish organizations.

*Connected to Give: Key Findings, 2012

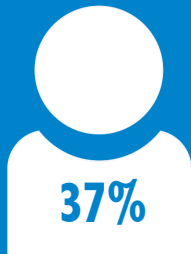
DONOR BEHAVIOR BY TYPE OF ORGANIZATION/CAUSE (%)

(Base: Respondents who donated money in the past year; n=1132)



PROGRAMS AND ACTIVITIES

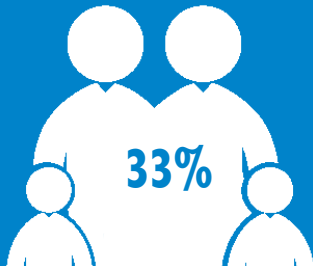
Which Groups Need More Programming and Activities?



JEWISH SINGLES

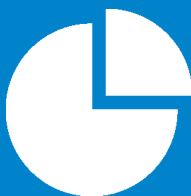
Programming for Jewish singles is identified as the greatest need (37%). Even higher percentages of people most likely to be affected by such programming see this as a need:

- 49% of those age 18-34
- 58% of those who are single/never married
- 45% of those who divorced/separated or widowed



INTERFAITH FAMILIES

60% of those who are in an interfaith relationship see this as a need, but across all constituents it is still one of the top needs at 33% of all respondents.



ABOUT A QUARTER OF ALL RESPONDENTS ALSO EXPRESSED NEED FOR PROGRAMS FOR:

- Young couples (27%)
- College students (23%)
- Empty nesters (22%)
- Teens (22%)
- Active older adults (21%)
- Parents of young children (20%)



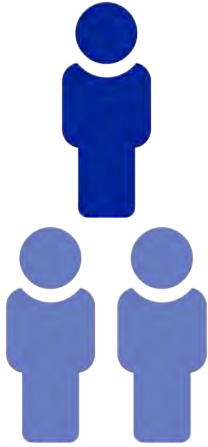
ADDITIONAL AUDIENCES IDENTIFIED INCLUDED:

- LGBTQ (16%)
- People with disabilities (14%)
- Holocaust survivors (7%)
- Those recovering from substance abuse (6%)



SOCIAL SERVICES

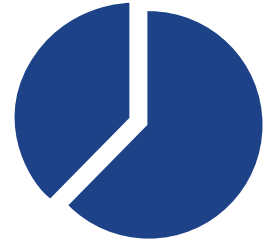
How Do Community Members Use Social Services?



Almost **THREE IN TEN** respondents say a member of their household used resources outside the family to cope with/manage a mental, cognitive, or physical challenge.

Mental illness was the most prevalent, mentioned by 14% of respondents.

One-third of respondents would prefer to receive help from a Jewish agency for almost all challenges, assuming that help were of equal quality and equally available. *The one exception is dementia/other neurological-related issues, where **NEARLY HALF** would prefer to use a Jewish agency.*



WHILE MOST RESPONDENTS ARE SELF-SUFFICIENT, SERVICES TO FIND A JOB AND PAY FOR BASIC NEEDS ARE IN DEMAND

12%

of all respondents sought help finding a job or choosing an occupation. Younger respondents were more likely to have sought employment help.



5% of all respondents sought help to pay for healthcare, food, medicine or rent and **3%** for food or housing support through an assistance program.

Are There People Who Do Not Receive Outside Help But Need It?



1 out of 10 RESPONDENTS SAY THEY COULD BENEFIT FROM ASSISTANCE FINDING A JOB OR CHOOSING AN OCCUPATION. THE NEED IS HIGHER AMONG...

- Respondents who are **<35** (15% could benefit)
- Respondents who are **55–64** (15% could benefit)
- Respondents with income **<\$50K** (19% could benefit)

7%

of respondents who don't currently receive it could benefit from assistance caring for an ill or elderly family member or friend.

5%

Fewer than **5%** of respondents who don't currently receive it could benefit from outside help with any other mental or physical challenge, caregiving challenge, or career or financial challenge.

Do Seniors Plan on Moving From Their Current Homes?

MOST SENIORS PLAN TO AGE IN PLACE

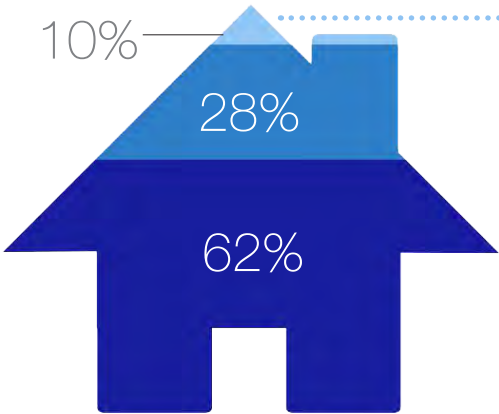
62%

Six in ten respondents over the age of 65 plan on remaining in their current homes as they age. 28% of respondents are unsure of their plans, and

10% predict that they will, or might, need senior housing. There are some differences by segment:

AGE: Respondents over age 75 now are more confident than those under 75 that they will remain at home.

COMMUNITY ENGAGEMENT: Interestingly, people who feel that they are connected to a Jewish community in Greater Hartford are more likely than those who do not feel connected to foresee that they will age in their current homes (67% and 49%, respectively).



PLAN ON AGING AT HOME (%)
(Base: Respondents 65+; n=479)

Age at home Unsure Seek other housing

OF THOSE WHO WILL SEEK
ALTERNATIVE HOUSING,
MOST EXPECT TO LIVE IN AN
55+ ACTIVE ADULT COMMUNITY

Do Caregivers Need Specialized Housing for Parents/Relatives?

THE NEED FOR SPECIALIZED HOUSING FOR AN AGING PARENT OR RELATIVE IS EXPECTED TO GROW

(Base: Total Respondents)

3%
Currently
Using

23%
Expect
to Need

16%
Unsure

58%
Do Not
Expect to
Need

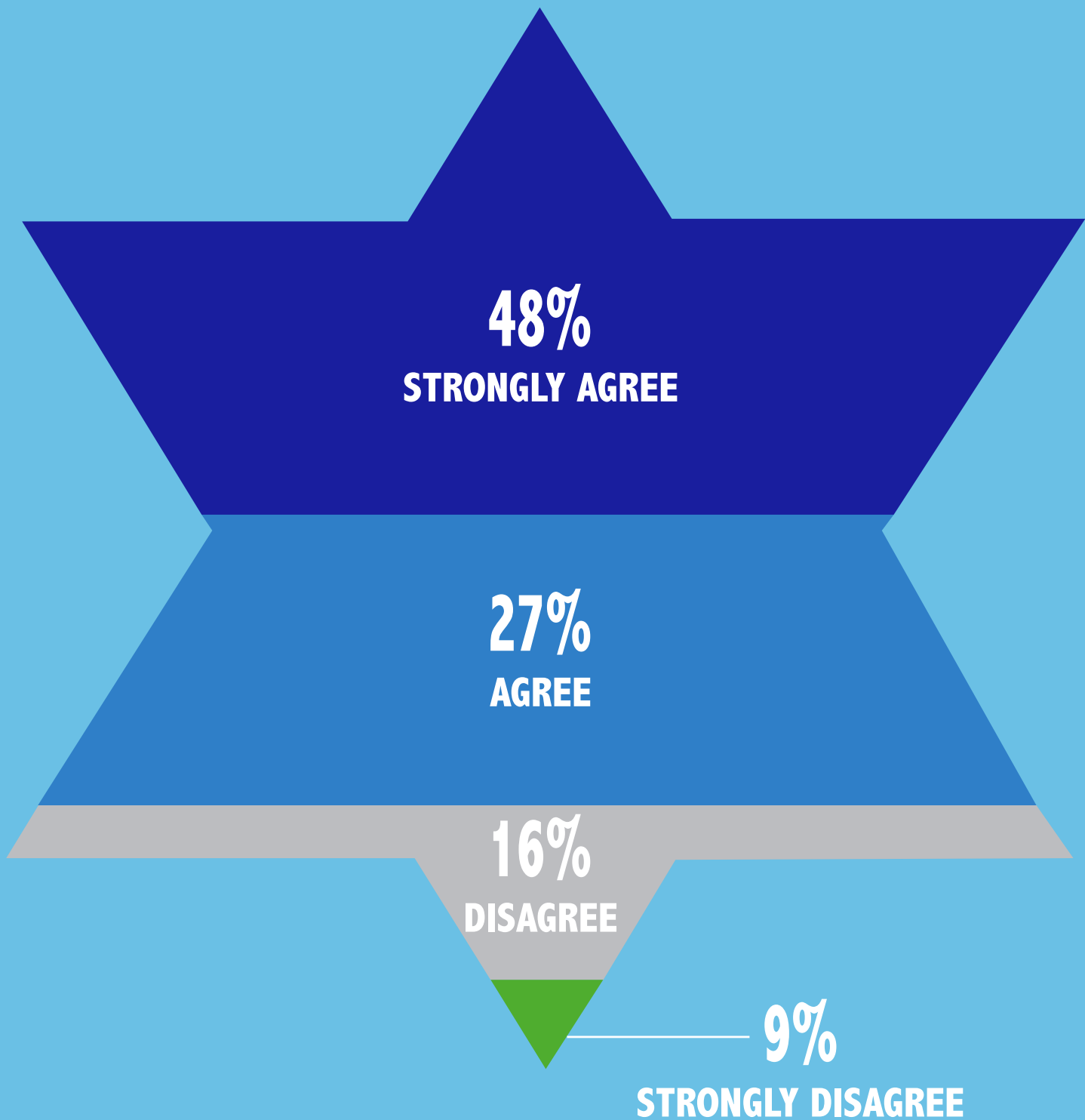
How Do Community Members Choose to Engage With Synagogues?

CURRENT MEMBERS	NON-MEMBERS	FUTURE MEMBERS
<p>76% of respondents are members of a synagogue, compared to roughly 33% of Jews nationwide (according to the 2013 Pew Study).</p> <p>73% of these synagogue members have belonged to a synagogue/temple/shul for more than 10 years.</p> <p>The three most important factors respondents considered when joining their current shul were:</p> <ul style="list-style-type: none"> • Comfort with religious practices • The rabbi • Synagogue denomination <p>Location and having friends/family belong were also very important to more than half of the respondents.</p>	<p>12% of respondents do not belong to a synagogue and do not plan to join in the future, and about half of these have never belonged.</p> <p>They most often say that synagogue membership is simply not important to them (41%), that it's not relevant to their lives (41%), and/or they have no interest in attending services (33%).</p> <p>Not feeling comfortable with other members (21%), and/or not finding meaning from services (17%) are less of an issue, though still consequential.</p> <p><i>Note that similar portions (18%) of non-members who are married to other Jews and those who are intermarried say that their partner not feeling comfortable is a reason they do not belong to a synagogue.</i></p>	<p>12% of respondents do not belong to a synagogue now but plan to join in the future.</p> <p>The greatest percentage of respondents say that very important to their selection will be denomination, cost, and having friends/family who belong at the synagogue.</p> <p><i>It is important to note that cost and friends/family are much less important to people who already belong to a synagogue.</i></p>

What Role Do Synagogues Play in Jewish Identity?

“Being a member of a synagogue
is part of my Jewish identity”

(Base: Total Respondents)





What Values Are Important To Parents?

OF THE VALUES TESTED, RESPONDENTS CARE MOST THAT THEIR CHILDREN FEEL PROUD TO BE JEWISH.

They tend to value knowledge of Jewish heritage, traditions, and culture along with Jewish values over knowledge of Jewish rituals and prayer. They place relatively less value on their children having Jewish friends or marrying someone who is Jewish.

91% of all parent respondents are raising children solely Jewish. For interfaith families, 51% are raising children solely Jewish, and 25% “Jewish and another religion.”

98% OF RESPONDENTS AGREE THAT

“Having my children feel proud to be Jewish is important to me.”

OF THOSE RESPONDENTS,

76% STRONGLY AGREE



99% OF RESPONDENTS AGREE THAT

“It is important that my children are knowledgeable about Jewish heritage, traditions and culture.”

OF THOSE RESPONDENTS,

71% STRONGLY AGREE



About Parent Respondents With Children Under Age 18

ABOUT ONE QUARTER OF ALL RESPONDENTS HAVE CHILDREN UNDER AGE 18. MANY OF THESE PARENT RESPONDENTS ARE QUITE ENGAGED IN THEIR CHILDREN'S JEWISH LIVES.



Nearly one-third have children aged 0-4; more than half have children aged 5-12; and more than half have children aged 13-17. **Note:** People have more than one child.

84%

of these respondents are married or have life partners. Of that group, 15% are in interfaith relationships and 24% have spouses whose parents were not Jewish.

5%

of all parent respondents do not participate in Jewish life at all.

In What Educational Activities Are Children Involved?

EDUCATION IS VERY IMPORTANT TO PARENT RESPONDENTS



- More than two-thirds of parent respondents with kids under 18 have enrolled their children in synagogue- or Chabad-based religious school



- Just about 4 in 10 parent respondents have sent at least one child to Jewish day school

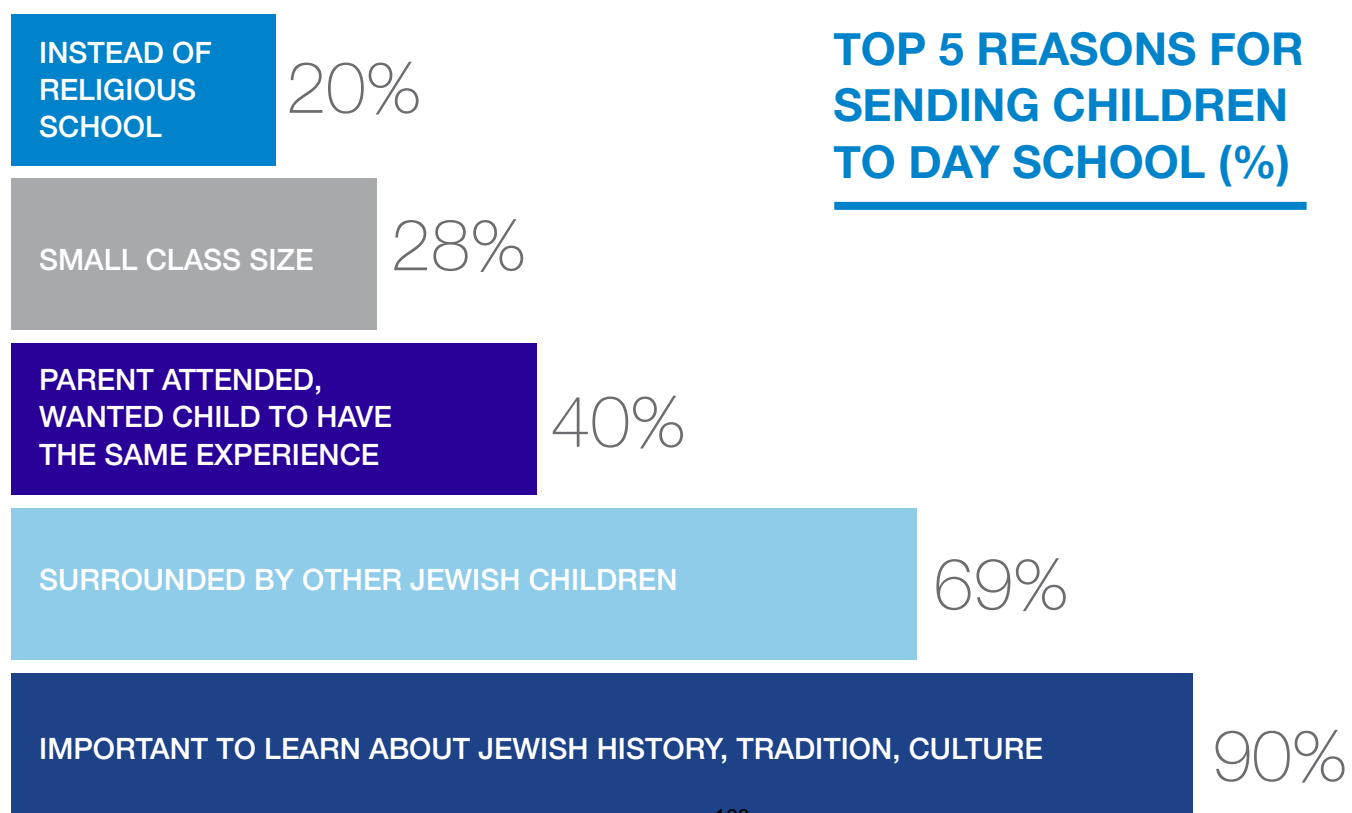


- Two-thirds (67%) of respondents with children under age 18 are sending (or sent) them to preschool in a Jewish setting



- Half received PJ Library books

Why Do Parents Send Kids to Jewish Day School?





What Social Activities and Day/Overnight Camps Do the Children of Respondents Attend?

JEWISH CHILDREN OF ALL AGES IN GREATER HARTFORD CONNECT TO THEIR JEWISH IDENTITY THROUGH SOCIAL ACTIVITIES AND CAMPING.



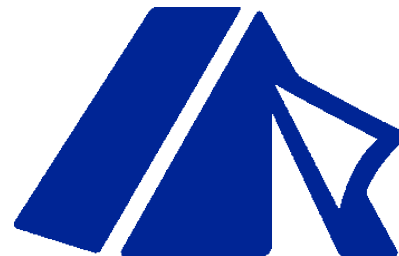
Just about one-third indicate their child has participated in a peer-based Israel trip (**31%**), and two-thirds (**68%**) expect that their child will participate when older.



More than one-quarter (**28%**) of parent respondents have involved their children in recreational sports in a Jewish setting.



More than half of parent respondents send their kids to Jewish day camp.



Just about 4 in 10 parent respondents send their kids to Jewish overnight camp.

FACTORS FOR A VIBRANT, HEALTHY, ENDURING COMMUNITY

What Is Most Important For a Healthy Community?



INSTITUTIONS

SYNAGOGUES **78%**

JEWISH COMMUNITY AND SOCIAL AGENCIES **50%**



PROGRAMS & SERVICES

QUALITY JEWISH EDUCATION FOR PEOPLE
OF ALL AGES **79%**

PROGRAMMING TO ENGAGE YOUNG FAMILIES **73%**

PROGRAMMING TO ENGAGE INTERFAITH FAMILIES **52%**



ATTRIBUTES

WELCOMING **60%**

AFFORDABLE/ACCEPTING OF RELIGIOUS
DIFFERENCES/INCLUSIVE (**EACH 46%**)

HOW WELL IS THE COMMUNITY DOING WITH THESE, THOUGH?

A Community Dashboard is under development that will measure progress on these key indicators. We will be able to dynamically track our community's success and understand trends over time.

Learn more on [JMAPCT.ORG](https://jmapct.org)

NEXT STEPS

What Can I Do?



Use these data. The data were gathered to help you and the organizations you care about! Boards of directors, staff and others will be using the information to inform their plans and engage in discussion. Go to www.jmapct.org for more detailed information.



Ask questions. The data provide information, and it's up to you to be curious, ask follow-up questions, and decide what these data mean for you and your favorite organizations.



Get customized reports. Can't find the info you're looking for? We're here to help. Make a request at www.jmapct.org and we'll be happy to provide you with a custom report with answers to the questions your group or organization need to make decisions about the future.



Track our progress. A community dashboard will provide ongoing success metrics over time, based on the factors of healthy community that respondents said were most important. Visit www.jmapct.org to see an early version of the dashboard, and check back in to see our progress.



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