



## BOARD OF TRUSTEES MEETING

April 20, 2020

### AGENDA

1. WELCOME (4:30 – 4:39)
  - 🕊 Good and Welfare
2. CONSENT AGENDA (4:39-4:40)\*
  - 🕊 Minutes of February 20, 2020 and March 19, 2020 Board Meetings pg.
  - 🕊 Approval of Palm Beach County Food Bank as a grantee pg.
3. PRESIDENT’S REPORT AND STAFF UPDATES (4:40-5:30) pg.
  - 🕊 Rapid Relief and Recovery Fund (RRRF) Updates
    - Grants Update
    - Food Program Update
    - Fund Development Update
  - 🕊 Looking Forward
4. INVESTMENT COMMITTEE REPORT (5:30-5:35) pg.
5. PERSPECTIVES FROM THE FIELD: Rabbi Tuvia Brander (5:35-5:50)

#### Appendix:

- 🕊 Management Dashboard pg.
- 🕊 Grant Reports pg.
- 🕊 RRRF Accounting Spreadsheet pg.
- 🕊 RRRF Communications Plan pg.
- 🕊 RRRF Fund Media Placements pg.

\*Items requiring a Board vote



### Board of Trustees

Minutes of Feb. 20, 2020

Call to order: 4:40 p.m. Adjournment: 6:35 p.m.

**Presiding:** Leigh A. Newman, Chair

**Recording:** M. Leighty

**Present:** Jessica L. Fish; Gerald B. Goldberg; Robert B. Goldfarb; Joshua Gottfried; Elysa L. Graber-Lipperman; Walter L. Harrison; Merrill Mandell; Leigh A. Newman; Steven F. Piaker; David M. Roth; Cyral A. Sheldon (phone); Julie R. Spivak; Gayle W. Temkin; Sidney Ulreich; Robert K. Yass; Carolyn Gitlin, *ex-officio*.

**Absent:** Blanche S. Goldenberg; Thomas M. Divine; Randall H. Weinstock.

**Also Attending** (non-voting): Jacob Schreiber, President & CEO; Michael Elfenbaum, Vice President Grant Programs; Sarah Geller, JewGood Hartford Co-Chair; Kathryn Gonnerman, Vice President Philanthropy; Madison Leighty, Development Assistant; Susan Lotreck, Vice President Donor Services; Elana MacGilpin, Development and Stewardship Officer; Rhona Morgan, Vice President Finance; Maureen O'Connell, Marketing Director.

| Agenda/Issue   | Discussion/Report   | Action/Approval   | Follow-Up  |
|--|---|---|--|
| Welcome and Chair's Remarks                              | Ms. Newman welcomed everyone to the meeting. She congratulated Ms. Lotreck on her 25-year work anniversary and Ms. Morgan on her 20-year work anniversary.  |   |  |
| <b>Consent Agenda</b><br><br>Minutes of Dec. 19, 2019.   | Ms. Newman directed attention to the proposed minutes from Dec. 19, 2019.   | Upon motion, duly made and seconded, the minutes of the Dec. 19, 2019 board meetings were unanimously approved. | Ms. Newman directed that the approved minutes be filed in the corporate minute book. |
| <b>President's Report</b><br><br>Strategic Plan Progress | Mr. Schreiber shared that the staff completed the strategic plan implementation framework, , noting a focus on stewardship and legacy giving Additionally, working with agency partners, such as the JCC and Chabad, on their own endowment or legacy campaigns will be an important element to build trust, support a function that agencies can't manage on their own, and develop new relationships. |   |  |

| Agenda/Issue  | Discussion/Report  | Action/Approval   | Follow-Up |
|---|--|---|-----------|
| <p>Management Dashboard Highlights</p> <p>Marketing Activity Update</p> | <p>Discussion followed around the nature of collaboration and how such partnerships might be received.</p> <p>Mr. Schreiber announced the upcoming Celebration of Legacy event, scheduled for May 5, 2020. The event will include legacy donors from across the community, including those whose gift will not come directly to (or through) the Foundation. Reviewing the management dashboard, he noted an increase in giving over the last quarter. He told the story of a legacy donor who worked with the same lawyer for decades, to demonstrate the importance of relationship building and stewardship.</p> <p>Ms. O'Connell presented an update on the Foundation's marketing efforts, including a collaborative sponsorship of the play "A Shayna Maidel" with the Federation, a new elevator pitch, and giving circle marketing efforts such as JewGood's social media #WhyIGive campaign and the Lillian Fund's publicity surrounding its 20<sup>th</sup> anniversary. She highlighted upcoming marketing efforts for the Lillian Fund..</p> |   |           |
| <p><b>Hebrew Senior Care Grant Request Discussion</b></p>               | <p>Ms. Newman directed the trustees' attention to the \$100,000 grant request from Hebrew Senior Care. Mr. Gottfried, Mr. Goldfarb, and Mr. Roth shared their findings from investigating the financials of the organization, praising the transparency of Hebrew Senior Care.</p> <p>Ms. Newman noted that the Foundation had provided Hebrew Senior Care with a \$200,000 loan two years prior and that this new capital grant was not within the normal guidelines of the Foundation's Community Grants Program. She clarified the options for responding to the grant request, including another loan, a partial grant, a match or last-dollar-in condition.</p> <p>.After extended discussion of several factors, the Trustees agreed on an approach.</p>   | <p>Upon motion, duly made and seconded, the Trustees unanimously approved a grant of \$100,000 to Hebrew Senior Care, granted as a match to HSC's capital campaign.</p> |           |

| Agenda/Issue   | Discussion/Report  | Action/Approval | Follow-Up   |
|--|--|-----------------|---|
| <b>Mission Moment: JewGood Hartford</b><br>Sarah Geller, JewGood Committee | Ms. Newman proposed that, due to time restraints, the governance committee report be postponed to the next meeting. and the Aim Chai report be presented after Ms. Geller's presentation.<br>Ms. Geller spoke about her experience as one of JewGood's founding members, providing personal testimonial as well as a strong case for the giving circle and its activities.   |                 |   |
| <b>Aim Chai Report</b>   | Ms. Gonnerman provided Aim Chai final numbers and a detailed breakdown of the money raised during the campaign. She praised the community's collaboration, and the matching fund initiative and transformational fund efforts, which helped bring new fundholders to the Foundation and provided needed support for community institutions. She emphasized the Foundation's responsibility of stewardship of new donors and fundholders, as well as transparent communication with partner agencies about the nature of funds and dollars raised for endowment during the campaign.<br><br>The board and staff discussed stewardship of new donors and fundholders. She shared the Foundation staff's strategy of sharing personal stories and creating authentic connections with donors about their concerns and hopes for the community and their philanthropy. |                 | The staff will review the Aim Chai data again, clarifying the "future intentions" category and following up on the question about which types of funds were created by new fundholders during the campaign. |
| <b>Adjournment:</b>  | Ms. Newman called the meeting to a close at 6:35 p.m. and urged board members to notify her or Mr. Schreiber if they had any suggestions for new trustees.   |                 | The governance committee report will be discussed at the next board meeting in April.   |

Respectfully submitted by:

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Gerald Goldberg, Secretary



### Board of Trustees

Minutes of Mar. 19, 2020

Call to order: 5:05 p.m. Adjournment: 6:25 p.m.

**Presiding:** Leigh A. Newman, Chair

**Recording:** M. Leighty

**Present:** Jessica L. Fish; Gerald B. Goldberg; Blanche S. Goldenberg; Robert B. Goldfarb; Joshua Gottfried; Walter L. Harrison; Merrill Mandell; Leigh A. Newman; Steven F. Piaker; David M. Roth; Cyral A. Sheldon; Julie R. Spivak; Gayle W. Temkin; Sidney Ulreich; Robert K. Yass; Carolyn Gitlin, *ex-officio*.

**Absent:** Thomas M. Divine; Elysa L. Graber-Lipperman; Randall H. Weinstock.

**Also Attending** (non-voting): Jacob Schreiber, President & CEO; Michael Elfenbaum, Vice President Grant Programs; Kathryn Gonnerman, Vice President, Philanthropy; Madison Leighty, Development Assistant; Susan Lotreck, Vice President, Donor Services; Elana MacGilpin, Development and Stewardship Officer; Rhona Morgan, Vice President, Finance; Maureen O'Connell, Marketing Director; David Waren, President & CEO, Jewish Federation of Greater Hartford.

| Agenda/Issue  | Discussion/Report  | Action/Approval | Follow-Up   |
|---|--|-----------------|---|
| Welcome and Chair's Remarks   | Mr. Schreiber welcomed everyone to the meeting. He expressed his appreciation for the Trustees' attendance and dedication, as well as the staff's hard work throughout their transition to remote work. He welcomed David Waren, President & CEO of the Jewish Federation of Greater Hartford, to the meeting.   |                 |   |
| <b>Impact of Market on Foundation Activities</b><br><br>Highlights of Monday's Investment Committee meeting | Mr. Roth presented an overview of the Investment Committee meeting, where the Committee discussed the operational and mission-based cash needs of the Foundation. Mr. Roth noted that the Foundation has a fixed range for balancing equities and liquid assets and that we are currently within that range. The Committee members are in regular conversation about the deployment of useful assets and have already made |                 | The Investment Committee will continue to be in conversation about the Foundation's finances as the situation develops. |

| Agenda/Issue  | Discussion/Report  | Action/Approval  | Follow-Up  |
|---|--|--|--|
| Projected financials: cash flow and income                    | <p>slight adjustments to the Foundation's financials, including deciding to sell \$3 million of a Vanguard bond fund. They are receiving guidance from Michael Miller of Colonial Consulting and, while aware of the potential capping of custodial funds and complications of granting from donor-advised funds, are comfortable with the state of the Foundation's portfolio, which is mostly liquid. The Foundation currently has just under \$7 million in cash on hand.</p> <p>Ms. Morgan shared recent budget projections, assuming no additional revenue from donations... She noted that situations like this are why the Foundation has a 20-quarter spending policy calculation, which should smooth out the effects of the current market.</p> <p>Discussion focused on the need to keep an eye on administrative fees and to develop a communication strategy for donor-advised fund holders who may want to increase granting from their funds.</p> |  | Staff will develop a communications plan for conversations with donor-advised fund holders.  |
| <b>COVID-19 Jewish Community Rapid Response Fund Proposal</b> | <p>Mr. Schreiber and Mr. Waren outlined the framework of the rapid response fund, which would address humanitarian needs of community members and operational needs of community institutions. Though needs will evolve, they will likely include food, counseling, medicine, financial assistance, and other social services.</p> <p>Mr. Schreiber proposed that the Foundation freeze the Community Grants Program and redirect \$100,000 of its funds for the fund. The fund would be operated jointly between the Federation and Foundation, with the Foundation hosting the money and the Federation collecting donations. Two committees would be created: A Fund Development Committee, co-chaired</p>  | <p>Upon motion, duly made and seconded, the Trustees unanimously approved the suspension the Community Grants Program.</p> <p>Upon motion, duly made and seconded, the Trustees unanimously approved the reallocation of \$100,000 from the Community Grants Program to create and seed the COVID-19 Jewish Community Rapid Response Fund.</p> | <p>Staff and lay leaders will continue to educate themselves about existing relief efforts in order to use the Rapid Response Fund most effectively and direct community members and institutions to additional resources to address their needs.</p> <p>Staff will develop a communications plan for the Rapid Response Fund.</p> |

| Agenda/Issue | Discussion/Report  | Action/Approval | Follow-Up   |
|--------------|--|-----------------|---|
|              | <p>by Dana Keller and Bruce Fischman, and a Grants Committee to determine the distribution of the fund. The fund would not be a competitor to community agencies' current efforts to aid the community; rather, it would help supplement their activities. Communications to donors would emphasize the importance of continuing their current support to community nonprofits, with donations to the rapid response fund being an addition to, rather than a replacement of, current philanthropic activity.</p> <p>The Trustees discussed many aspects of the proposed plan, including:</p> <ul style="list-style-type: none"> <li>• The need to direct resources toward unaddressed needs, rather than duplicating the efforts of other institutions The importance of communicating a single message of the Foundation's and Federation's effort to help the community.</li> <li>• The complications of prioritizing aid to individual needs over agency operational support.</li> <li>• The purpose of dollars remaining from the FY2020 Community Grants Program that would not be used to immediately seed the fund. The long-term effects of the COVID-19 outbreak that will extend the fund's necessity beyond the immediate addressing of humanitarian needs.</li> <li>• The sensitivity of all, including the wealthy, about spending money at this time, which may lead to donor sensitivity about being solicited for philanthropic donations. The possibility of utilizing the senior transportation program, to which the Foundation recently provided a grant, to provide food delivery to vulnerable</li> </ul> |                 | <p>The joint Federation-Foundation team will move forward with creating, seeding and communicating the COVID-19 Jewish Community Rapid Response Fund.</p> |

| Agenda/Issue        | Discussion/Report  | Action/Approval | Follow-Up |
|---------------------|--|-----------------|-----------|
|                     | community members in lieu of rides to social events that will likely no longer be happening.   |                 |           |
| <b>Adjournment:</b> | Ms. Newman thanked the Trustees and called the meeting to a close at 6:25 p.m., noting that while there were likely to be more last-minute meetings to address the pandemic, they would be held only when necessary. Mr. Schreiber stated that the staff will be ready to launch the fund very soon. |                 |           |

Respectfully submitted by:

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Gerald Goldberg, Secretary





## MEMORANDUM

To: JCF Board of Trustees

From: Michael Elfenbaum, VP Grant Programs

Re: New Grantee Approval

The Foundation has received a donor advised fund grant recommendation in the amount of \$20,000 to the Palm Beach County Food Bank, a qualified 501(c)(3) non-profit organization. PBCF is a non-sectarian organization that provides food to those in need throughout Palm Beach County, FL. Their mission conforms to the values and mission of JCF.

Per Foundation policy, any first-time grantee receiving a grant of greater than \$10,000 must first be approved by the Board of Trustees as grantee of the Foundation.

**ACTION REQUIRED:** The Palm Beach County Food Bank hereby be approved as a qualified grantee of the Jewish Community Foundation of Greater Hartford.



## **President's Report/ Q3 FY2020**

***April 24, 2020***

*Mann tracht un Gott acht*

*(Man Plans and God Laughs)*

--Old Yiddish adage

A short three months ago, I penned a President's Report filled with confidence and direction. Our organization had completed its Phase I Implementation Plan for our newly approved Strategic Plan, and we felt we were humming on all cylinders. The stock market was still a raging bull, our net assets were at \$128 million (up 17% over the previous year) and we seemed well-positioned to focus our efforts on working with our community partners on legacy/endowment campaigns to secure their vibrant futures.

Wow has life changed. You don't need me to write more about the challenges we all are facing -- personally, organizationally and economically -- due to the COVID-19 pandemic. There's plenty of material on that. What I can tell you is that the Foundation has perhaps never been more motivated -- and focused -- on doing all we can to help make our world a better, kinder, safer place.

Today, in these extraordinary times of crisis, *tikkun olam* -- healing the world -- is all about *tikkun bnai enosh* -- healing human beings. And so the Foundation has jumped in with two feet to partner with Federation to build the *Jewish Hartford Rapid Relief and Recovery Fund* (RRRF) to immediately address basic human needs and to help our synagogues and agencies get through these tough times. We are incredibly blessed to have an amazing staff, who have largely pivoted away from doing the functions for which they were hired -- in favor of doing what is now required.

From heading the logistics for emergency food distribution and making deliveries to administering financial assistance requests, and from advising our agencies and synagogues on applying for the SBA's Paycheck Protection loans to soliciting gifts for the RRRF, our staff is doing it all -- *whenever* they are needed.

And you, our Trustees, have stepped up too. Thank you for spending countless hours on Zoom with us and with other organizations to lend your time, counsel and help. Thank you for generously supporting the RRRF and for your leadership in soliciting donations and serving on committees to bolster its efforts. Thank you for making calls to our donors just to check in and for communicating with me and our staff to lend your encouragement and valuable feedback.

I know you are as grateful and enthusiastic as our staff for the opportunity to play role in the sacred healing process.

In this report, I will focus exclusively on the Foundation's COVID-19 related activities, as this is both the most important *and* urgent matter of the day. This doesn't mean this is all we are doing. Our staff are surely continuing their good work to maintain the basic operations and key donor-related functions of the Foundation. This includes processing donations and grant recommendations, managing scholarship requests (45), sending out birthday cards and condolence notes, paying bills and building budgets, refining our communications, planning a Lillian Fund Mother's Day campaign, running virtual JewGood programs, and so much more.

Let's hope that by our June meeting, we will have more to talk about than just COVID-19.

### **COVID-19 RELATED ACTIVITIES**

COVID-19 relief and recovery efforts have been a total team effort, in close collaboration with the Federation, particularly in fundraising, developing and executing an overall grants process, food distribution and communications.

To date, the Fund Development Committee, led by Bruce Fischman and Dana Keller, has raised more than \$840,000 from 340 gifts. This includes:

- \$190,000 from Donor Advised Funds at the Foundation
- \$100,000 from the Foundation's Community Grants Program
- \$20,000 from Designated Funds at the Foundation
- \$50,000 from the Federation
- \$150,000 in donations to start a Hebrew Interest-Free Loan Fund (development is in progress)
- \$330,000 in other individual donations from multiple sources

**Gayle Temkin, Walter Harrison, Leigh Newman, Carolyn Gitlin and Kathryn Gonnerman** have all played important roles in raising these funds, as members of this committee. Please note that **Federation will be running a Virtual Super Sunday event on May 3 from 9:00am-noon** to help close gifts for its 2020 annual campaign and to ask community members to contribute to the RRRF. If you are interested in being part of the volunteer team, please contact [bbaronas@jewishhartford.org](mailto:bbaronas@jewishhartford.org) for Zoom instructions.

In addition to the COVID-19 fundraising efforts, JCF's development team has focused on being of service, primarily through food distribution, partnering with agencies and synagogues to discuss fundraising strategy, and analyzing designated and custodial fund holdings for agencies seeking to understand their opportunities for emergency funding.

We have also doubled-down on stewardship (part of our long-term strategic plan commitment to relationship-based engagement), making nearly 300 check-in calls with many staff and board members pitching in to help us stay connected. We've recorded all of our learnings in our database for future reference.

On April 1, we hosted a Zoom call with Mike Miller of Colonial Investing, with about 40 donors in attendance (higher than in any year previous). The slides and recording was shared via email, and many donors shared that the presentation was reassuring, educational, and confidence-boosting.

On the **Grants** side of things, **Michael Elfenbaum** has played a leading role, together with Laura Zimmerman, in staffing the RRRF Grants Committee and in crafting the grants process. Co-chaired by **Sid Ulreich** and David Rosenthal, the committee developed two grant programs:

1. **Financial Assistance to individuals** – which currently provides grants of up to \$750 per household in the Jewish community (based upon household size) that were impacted directly by COVID-19 (i.e. laid off/furloughed from job or safety net disrupted). An online form on the Federation website is available to submit a request, at <https://www.jewishhartford.org/get-help-covid19> (our website has a link to this one). We also are hearing directly from Rabbis who have been approached for assistance.
2. **Transitional Operating Support to local Jewish agencies and synagogues** -- to help bolster our community partners struggling financially from the impact of COVID-19. The Committee is currently working on getting a community-wide picture of overall needs by assessing the projected needs of our agencies and synagogues. Hopefully, this will help the Grants Committee establish criteria and priorities that are in-line with available

community resources. While we need to address short-term needs, we must also look at the long-term impact on our community. The latter part of this initiative will be led by **Gayle Temkin** and Jeff Gitlin.

- Committee members, along with other talented lay leaders, have been assigned as liaisons to agencies and synagogues to help them establish short- and long-term projections on their financial need
- We anticipate that a large portion of the RRRF will be needed to provide transitional operating support, and have told all agencies and synagogues that while there will be assistance, we will not have the capacity to close all budget gaps
- We are tracking who has received PPP loans and who was wait listed. Where needed and/or requested, liaisons are providing counsel for those who were wait listed

In addition, the Food Program will also be under the purview of the Grants Committee. Up until now, the Food Program, comprised mainly of Foundation and Federation staff, has been operating in “emergency start-up mode.” As such, it was charged with establishing an entirely new system for food procurement and delivery, and permitted to spend “what was necessary” to get us through Passover (and a few weeks after). They did an incredible job. As of April 21, here’s what was achieved over four weeks of deliveries of both Kosher food delivery and Kosher for Passover food delivery:

- Delivered to 125 households (30 of which included Holocaust survivors) in 19 different towns
- 310 bags of groceries (pantry staples including packaged, canned & shelf-stable proteins, veggies, starches, etc., plus fresh fruit – purchased in bulk from local retail grocery stores as well as from JCC Café vendors)
- 2,500 prepared/frozen prepared meals (1700 frozen, kosher for Passover meals from the catering company that provides meals to El Al Airlines and stored at Congregation Beth Israel. Fresh meals were purchased from Yosi Kosher Catering, Abel Caterers and The Crown Market.)
- 80 Dignity Packs (soap, shampoo, deodorant, toothbrush & toothpaste, plus menstrual hygiene products)
- Deliveries were made by Envoy America (20 drivers), 8 staff and 10 volunteers – averaging 15 routes per week

Please note that **Elana MacGilpin** has been a valiant figure in this operation. While most of us were working at home, Elana chose to be out most every day, buying and picking up food, sorting it into paper bags (she got donated), designing delivery routes for drivers, being on-site to manage the distribution system on delivery days and making deliveries herself. Also worth noting is that the volunteer driver corps included **Maureen, Goldy, GJerGji, Kathryn** (and her spouse), me (and my spouse) and the spouses of Elana and Michael.

Now that Passover is behind us, Federation and Foundation are currently evaluating the food program to identify the most efficient way to operate, given our limited human resources. Staff are preparing a report, including an accounting of funds spent, plus recommendations and projected expenses for the next 4-8 weeks. The plan is for the Grants Committee to review the report and to start approving block grants to the Food Service Program *before* funds are committed to insure proper controls.

Meanwhile, the **Finance Department** swung into action when news of the SBA’s Paycheck Protection Loan program hit the airways. Thanks to the skill and *intensive* work invested by **Rhona Morgan** and **Christine Kelly**, the Foundation was fortunate to secure a loan of \$230,000. Based on the loan’s terms, we expect the entire sum of the loan to convert into an outright grant. We expect to receive the funds any day now.

To support all the activities of the RRRF, the **Maureen O’Connell** quickly developed a marketing plan, in partnership with Federation. The team is using eblasts, website landing pages, traditional media and Zoom calls to effectively communicate to RRR Fund’s goals and how to apply for assistance. To date, the team has secured 10 news stories in local outlets including TV interviews with Jacob and David Warren on Channel 30/NBC and Channel 3/CBS (which

Maureen O'Connell directed on-site during Passover food delivery day), and stories in the Connecticut Jewish Ledger and the Hartford Courant. Jacob also wrote about the RRRF in his third installment of "The J Factor," a monthly news column for West Hartford News. The communications plan and media results are included in this packet. Also, of great help is **Madison Leighty's** research and analysis of various communications approaches to help us employ best practices when marketing the RRRF.

Finally, as we begin to look strategically towards the future, we are asking ourselves the following key questions:

- How do we best serve community over the next year or so, when we expect endowment and legacy giving to drop significantly? Do we focus on doing great stewardship and wait for the economy and markets to recover? What new, creative ways can we employ to enhance such stewardship?
- What else might we focus on? Donor education? Family philanthropy education and initiatives? Providing more consulting to our agency partners on fundraising?
- What strategies can we employ to ensure our *own* financial health? With projected drops in fees and cash flow (from the expected decrease in donations to our Foundation), is there anything more we can do on the resource/development front other than concentrating a great stewardship?
- Before COVID-19 hit, our Foundation was going to pivot its efforts to concentrate on helping our agencies build their legacy/endowment portfolios with us. Is this something for which we should continue preparing the ground for when the economy turns around? What are the best approaches we should focus on?

To begin addressing these topics, our Foundation initiated and is hosting a Zoom conference next week with 16 CEOs and development professionals from independent Jewish Community Foundations from around the country. In addition, Michael is representing the Jewish community at a roundtable of non-profit grantmakers, hosted by the Hartford Foundation. **Susie Lotrek** has been religiously monitoring Connecticut Council for Philanthropy (CCP) and other community foundation resources. I participate in a weekly meeting of CCP CEOs. And our staff are always culling the web and speaking with colleagues to source new ideas and opportunities for collaboration.

At this point, it is fair to say we have more questions than answers. It's hard to devise solutions when facing a foe we have never seen in our lifetimes -- and when so many aspects of life are so uncertain. But we are a resilient bunch. And we have a sacred job to do.

So why not approach it vigor and hope?

**Investment Committee****March 17, 2020**

Call to order: 8:00 AM Adjournment: 9:00 AM

**Presiding:** Jay S. Spivak, Chair**Recording:** Rhona/Susie/Kathryn**Present:** Brian S. Fierston, Gerry Goldberg, Joshua Gottfried, David Marks, Alan Mendelson, David Miller, David Roth, Leigh Newman *ex-officio***Absent:** Robert Goldfarb**Also Attending:** Michael Miller, Colonial Consulting; Rhona H. Morgan, VP Finance; Jacob Schreiber, President & CEO; Kathryn Gonnerman, VP Philanthropy, Susan Lotreck, VP, and Christine Kelly, Controller

| Agenda/Issue  | Discussion/Report   | Action/Approval | Follow-Up |
|---|---|-----------------|-----------|
| Chair's Remarks   | Mr. Spivak called the meeting to order.   |                 |           |
| <b>Review current standing of portfolio in light of historical data</b> | <p>Mr. Miller reviewed the materials provided, looking at prior drawdown periods or the time until the high water mark is regained. He noted that the time until the high water mark is regained was relatively short previously. He also indicated that a large shift in market and economic conditions could easily be the catalyst that shifts investor preferences with value potentially benefiting on a relative basis after a long period as the out of favor style.</p> <p>He noted that Colonial's estimates of portfolio returns and exposures are based on their internal holdings based system along with publicly available information for mutual funds. While some of the information is</p> |                 |           |

| Agenda/Issue                         | Discussion/Report   | Action/Approval | Follow-Up |
|--------------------------------------|---|-----------------|-----------|
|                                      | based on estimates, the information is close enough to inform the Committee's decisions.  |                 |           |
| Considerations regarding Rebalancing | <p>He advised the committee that the assets classes are all generally within the range, so it was not "necessary" to rebalance as of right now. He reminded the committee that disciplined rebalancing is important, but that we want to be actively considering the asset class range (not just one percentage) and also remember that rebalancing may have to happen more than once.</p> <p>A member asked about pre-emptive rebalancing, i.e., is there a need to change asset allocation. Mr. Miller explained that we had approximately 13% of the portfolio in high quality bonds as a defensive asset, and that could be considered a floor, such that he wouldn't recommend changing the asset allocation at this time.</p> <p>The committee discussed different scenarios for rebalancing: 1) because our discipline and policy require it; 2) to mitigate risk; 3) to be opportunistic.</p> |                 |           |
| Liquidity and Cash Availability      | Ms. Morgan reported that the Foundation has approx. \$4 million in cash. Mr. Miller reported that we had about \$20 million in fixed income assets. The committee asked how much of that was in corporate bonds (about ¼ of the total) and also about mortgage-backed sector (any exposure through mutual funds).   |                 |           |

| Agenda/Issue                          | Discussion/Report  | Action/Approval  | Follow-Up  |
|---------------------------------------|--|--|--|
|                                       | Ms. Morgan also reported that 9-month projections indicated \$5 million cash needs. The committee debated how much cash should be harvested right now given this information and projected needs of the community. Mr. Schreiber also mentioned that some organizations may need to draw on custodial funds (the terms of which depend on each org's fund agreement).  |  |  |
| Bonds and Fixed Income Considerations | <p>After discussion, the committee entertained a motion to sell a \$3 million position in corporate bonds to eliminate that risk and also harvest cash. They discussed the following actions:</p> <ol style="list-style-type: none"> <li>1) Leave \$2 million in cash and invest \$1 million in one of the following: <ol style="list-style-type: none"> <li>a. Add to existing index fund</li> <li>b. Buy into government bond index fund</li> <li>c. Add to TIPS position</li> <li>d. Buy into equity market</li> </ol> </li> <li>2) Keep \$3 million in cash</li> </ol> | Upon motion, duly made and seconded, the committee decided to liquidate Vanguard Investment Grade Bonds and keep proceeds in cash for now. | Staff and Colonial to coordinate liquidation. The Vanguard Intermediate Investment Grade Bond Fund was fully liquidated on 3/17/2020 |
| Preparing for next steps              | The committee discussed what to expect moving forward. First, if the portfolio goes outside of the ranges, we will need to look at rebalancing – would likely get on a call and be specific about where to take from and where it would go based on the data at the time. Colonial is also monitoring for opportunities to get access to managers that are otherwise very hard to access. They usually open briefly in these scenarios. Would have to look at liquidity in the considerations of these managers when the time presents itself.                             | Colonial, staff and the committee will continue to actively monitor changes, meet regularly, and make adjustments as needed.               |  |



Respectfully submitted by

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Jay S. Spivak

## Management Dashboard

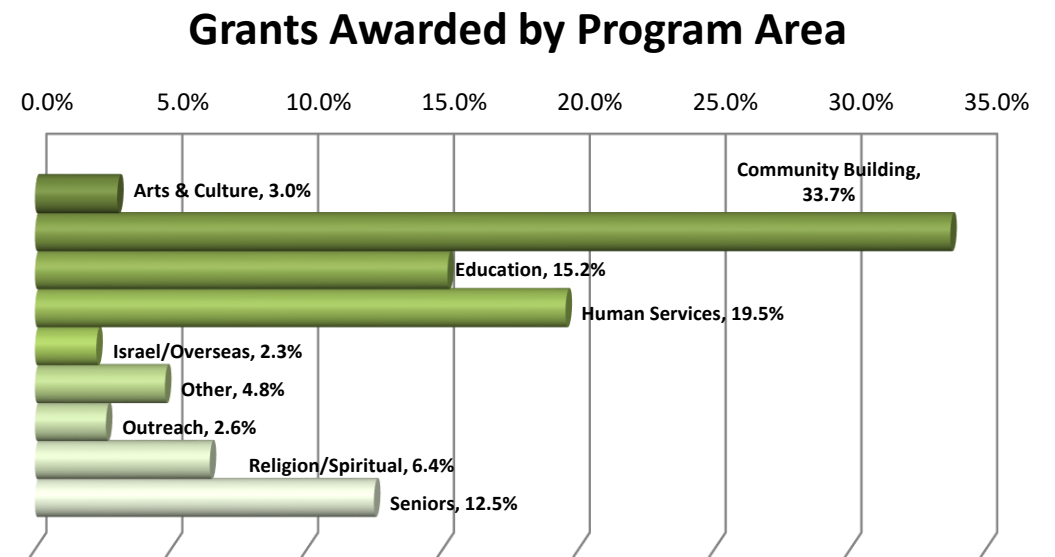
|   |             |                                    |                                    |                          |                   |                    |
|---|-------------|------------------------------------|------------------------------------|--------------------------|-------------------|--------------------|
| <b>Finance:</b>   | <b>FYTD</b> | <b><u>12/31/2019</u></b>           | <b><u>12/31/2018</u></b>           |                          |                   |                    |
| Revenue as a % of Budget                                  |             | 99%                                | 100%                               |                          |                   |                    |
| Expenses as % of Budget                                   |             | 92%                                | 86%                                |                          |                   |                    |
| Current Operating Surplus(Deficit)                        |             | 31,212                             | 60,937                             |                          |                   |                    |
| Cum. Operating Surplus/(Deficit)                          |             | 250,496                            | 292,936                            |                          |                   |                    |
| Personnel Exp. as % of Assets                             |             | 0.56%                              | 0.52%                              |                          |                   |                    |
|   |             |                                    |                                    |                          |                   |                    |
| <b>Investment Return (3/31/2020)</b>                      |             | <b><u>Cal. YTD</u></b>             | <b><u>1yr.</u></b>                 | <b><u>3yr.</u></b>       | <b><u>5yr</u></b> | <b><u>10yr</u></b> |
| JCF:  |             | -17.6%                             | -11.4%                             | 0.3%                     | 1.8%              | 4.9%               |
| Overall Market Benchmark:                                 |             | -18.2%                             | -9.80%                             | 0.9%                     | 2.2%              | 5.3%               |
|   |             |                                    |                                    | <b>% Growthn</b>         |                   |                    |
|   | <b>FYTD</b> | <b>Fund Balance<br/>3/31/2020*</b> | <b>Fund Balance<br/>3/31/2019*</b> | <b>Prior Yr.<br/>End</b> |                   |                    |
| Unrestricted  |             | 24,578,172                         | 28,321,546                         | -13.22%                  |                   |                    |
| Donor Advised   |             | 30,578,777                         | 36,265,770                         | -15.68%                  |                   |                    |
| Designated  |             | 35,004,324                         | 39,673,148                         | -11.77%                  |                   |                    |
| Custodial   |             | 15,242,352                         | 16,041,693                         | -4.98%                   |                   |                    |
| JCF Holdings A, LLC                                       |             | 1                                  | 1                                  | 0.00%                    |                   |                    |
| <b>Total</b>  |             | <b>\$ 105,403,626</b>              | <b>\$ 120,302,157</b>              | <b>-12.38%</b>           |                   |                    |
|   |             |                                    |                                    |                          |                   |                    |
| <b>*Fund Balances does not reflect pledge receivables</b> |             |                                    |                                    |                          |                   |                    |

**\*Fund Balances does not reflect pledge receivables**

| <b><u>Development/Donors:*</u></b>          | <b><u>4/17/2020</u></b> | <b><u>4/17/2019</u></b> |  |  |  |
|---|-------------------------|-------------------------|--|--|--|
| New Funds FYTD                              | 16                      | 30                      |  |  |  |
| New Donors FYTD                             | 118                     | 182                     |  |  |  |
| New Custodial Funds FYTD                    | 7                       | 7                       |  |  |  |
| New Custodial Funds Value FYTD              | \$ 926,616              | \$ 50,005               |  |  |  |
|   |                         |                         |  |  |  |
| Bequests/Legal Transfers Gift FYTD          | 10                      | 9                       |  |  |  |
| Bequests/Legal Transfers Value FYTD         | \$ 727,997              | \$ 1,150,946            |  |  |  |
| As % of Total Donations FYTD                | 17.2%                   | 34.0%                   |  |  |  |
|   |                         |                         |  |  |  |
| <b>Total Donations FYTD*</b>                | <b>\$ 4,230,901</b>     | <b>\$ 3,384,763</b>     |  |  |  |
| Unrestricted Funds                          | \$ 543,353              | \$ 162,151              |  |  |  |
| Donor Advised Funds                         | \$ 1,076,479            | \$ 1,113,752            |  |  |  |
| Designated Funds                            | \$ 661,534              | \$ 1,038,920            |  |  |  |
| Custodial Funds                             | \$ 1,949,535            | \$ 1,069,939            |  |  |  |
|   |                         |                         |  |  |  |
|   |                         |                         |  |  |  |
| <b>* Reflects cash received not pledges</b> |                         |                         |  |  |  |

\* Reflects cash received not pledges

| <b><u>Impact:</u></b>               | <b><u>Unrestricted</u></b> | <b><u>Donor Advised</u></b> | <b><u>Designated</u></b> |
|-------------------------------------|----------------------------|-----------------------------|--------------------------|
| Grants FYTD as of 4/19/2020(#!/\$): | 15/\$813,043               | 495/\$1,675,948             | 427/\$1,408,233          |
| Grants FYTD as of 4/19/2019 (#!/\$) | 14/\$1,080,408             | 457/\$1,781,973             | 450/\$1,338,724          |



| Communication/Awareness:                          |                    |                    |                 |
|---|--------------------|--------------------|-----------------|
| Facebook  | <u>Spring 2020</u> | <u>Winter 2020</u> | <u>% Change</u> |
| Page Likes  | 582                | 567                | 3%              |
| Post Reach  | 4,471              | 3,190              | 40%             |
|   |                    |                    |                 |
| Email Marketing*                                  | Spring 2020        | Winter 2020        | % Change        |
| Average Open Rate                                 | 40%                | 25%                | 60%             |
|   |                    |                    |                 |
|   |                    |                    |                 |
| Media Placements                                  | Spring 2020        | Winter 2020        |                 |
|   | 11                 | 10                 | 10%             |
|   |                    |                    |                 |
|   |                    |                    |                 |
|   |                    |                    |                 |
|   |                    |                    |                 |
|   |                    |                    |                 |
| *All eblasts were about COVID-19 and the RRR Fund |                    |                    |                 |

\*All ebcasts were about COVID-19 and the RRR Fund



Community Grants Budget - Projected  
July 1, 2019-June 30, 2020  
(as of 4/23/2020)

|  | 7/1/19-6/30/20<br>Projected Amount | Changes<br>Year to Date |
|--|------------------------------------|-------------------------|
| <b>Amount Available for Grants under Spending Policy<sup>1</sup></b>                                   | <b>\$ 1,025,814</b>                |                         |
| Plus: Over/Unexpended prior years' spendable amount  | \$ 7,399                           |                         |
| Plus: Grant cancellations  |                                    | \$ 75,801               |
| <b>Total Amount Available for Grants in FYE 6/30/2020</b>  | <b>\$ 1,033,213</b>                | <b>\$ 75,801</b>        |
| <b>"Contractual" Funding Obligations</b>   |                                    |                         |
| Less: Grants to Federation from Board-restricted funds<br>benefiting the Foundation and the Federation | \$ (4,969)                         | \$ -                    |
| Less: Grants to Federation for its discretionary use   | \$ (148,757)                       | \$ -                    |
| <b>Board Discretionary Grants</b>  |                                    |                         |
| Less: Jewish Community Foundation<br>Operating Support FYE 6/30/2020                                   | \$ (325,000)                       |                         |
| Less: Jewish Community Foundation<br>Center for Innovative Philanthropy FYE 6/30/2020                  | \$ (75,000)                        |                         |
| Less: Hebrew Senior Care   |                                    |                         |
| Behavioral Health Unit Renovations   |                                    | \$ (100,000)            |
| Less: Jewish Community Foundation<br>COVID-19 Fund   |                                    | \$ (100,000)            |
| <b>Above the Line Grants Awarded in FYE 6/30/2020</b>  | <b>\$ (553,725)</b>                | <b>\$ (200,000)</b>     |
| <b>"Competitive" Grants</b>  |                                    |                         |
| Less: JT Connect<br>Program Associate <sup>2</sup>   |                                    | \$ (45,000)             |
| Less: Mandell JCC<br>PJ Connectors <sup>3</sup>  |                                    | \$ (8,030)              |
| Less: Voices of Hope<br>Strategic Planning Consultant  |                                    | \$ (12,430)             |
| Less: Jewish Federation of Greater Hartford<br>Wexner Heritage Program <sup>4</sup>                    |                                    | \$ (11,667)             |
| Less: University of Hartford Hillel<br>Engagement Associate <sup>5</sup>                               |                                    | \$ (33,760)             |
| Less: Mandell JCC<br>Strategic Planning Consultant   |                                    | \$ (20,400)             |
| <b>Competitive Grants Awarded in FYE 6/30/2020</b>   | <b>\$ -</b>                        | <b>\$ (131,287)</b>     |
| <b>"Synagogue Community Building Grants"</b>   |                                    |                         |
| Less: Beth Israel<br>Celebrate CBI   |                                    | \$ (2,000)              |
| Less: Beth David   |                                    |                         |

|   |              |              |
|---|--------------|--------------|
| Scholar-in-Residence Series   |              | \$ (2,000)   |
| Less: Farmington Valley Jewish Congregation - Emek Shalom<br>family holiday programming |              | \$ (2,000)   |
| Less: Temple Beth Hillel<br>Community Seder   |              | \$ (2,000)   |
| <b>Synagogue Grants Awarded in FYE 6/30/20</b>  | \$ -         | \$ (8,000)   |
| <b>Total Community Grants Awarded in FYE 6/30/2020</b>                                  | \$ (553,725) | \$ (339,287) |
| <b>Operating reserve</b>  | \$ -         |              |
| <b>Grant Spending Amount available in FYE 6/30/2020</b>                                 | \$ 479,487   | \$ (263,486) |
| <b>Operating Reserve Funds</b>  |              |              |
| <b>Grant Spending Amount available in FYE 6/30/2020 with Operating Reserve</b>          | \$ 204,385   |              |

<sup>1</sup> This projected amount is equal to 3.75% (5% spending less 1.25% administrative fee) of the 16-quarter trailing average balance of unrestricted community funds as of June 30, 2019, to account the minimum and maximum spending limitations under the Foundation's spending policy.

<sup>4</sup> The total grant to JT Connect is \$120,000 over 3 years (FY20-\$45,000, FY21-\$40,000 and FY22-\$35,000)

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

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

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

S:\Excel\FY2019\Community Grants Budget FY2020

| Revised<br>Projection |           |
|-----------------------|-----------|
| \$                    | 1,025,814 |
| \$                    | 7,399     |
| \$                    | 75,801    |
| \$                    | 1,109,014 |
|                       |           |
| \$                    | (4,969)   |
| \$                    | (148,757) |
|                       |           |
| \$                    | (325,000) |
| \$                    | (75,000)  |
|                       |           |
| \$                    | (100,000) |
|                       |           |
| \$                    | (100,000) |
| \$                    | (753,725) |
|                       |           |
|                       |           |
| \$                    | (45,000)  |
| \$                    | (8,030)   |
| \$                    | (12,430)  |
| \$                    | (11,667)  |
| \$                    | (33,760)  |
| \$                    | (20,400)  |
| \$                    | (131,287) |
|                       |           |
| \$                    | (2,000)   |

|    |           |
|----|-----------|
| \$ | (2,000)   |
| \$ | (2,000)   |
| \$ | (2,000)   |
| \$ | (8,000)   |
| \$ | (893,012) |
| \$ | -         |
| \$ | 216,001   |
|    |           |
| \$ | 420,386   |

18, adjusted to take into

**Donor Advised Grants**  
**February 11, 2020 - April 19, 2020**

| <b>Grantee</b>                                   | <b>Program Name</b>                                | <b>Grant Date</b> | <b>Granted</b> |
|--|--|-------------------|----------------|
| AIDS Connecticut                                 | general operating support                          | 2/12/2020         | \$4,000.00     |
| American Friends of NATAL                        | general operating support                          | 2/28/2020         | \$368.00       |
| American Friends of NATAL                        | general operating support                          | 3/27/2020         | \$2,500.00     |
| Anti-Defamation League CT Regional Office        | general operating support                          | 2/11/2020         | \$500.00       |
| Anti-Defamation League CT Regional Office        | general operating support                          | 2/12/2020         | \$5,000.00     |
| Beth David Synagogue                             | general operating support                          | 2/21/2020         | \$700.00       |
| Beth El Temple of West Hartford                  | Rabbi Rosen's Discretionary Fund                   | 4/1/2020          | \$1,200.00     |
| Chabad Friendship Circle                         | Shabbat with Six13                                 | 2/28/2020         | \$500.00       |
| Charter Oak Cultural Center                      | building fund                                      | 3/13/2020         | \$5,000.00     |
| Charter Oak Cultural Center                      | Virtual Vision awards                              | 4/12/2020         | \$2,500.00     |
| Congregation Beth Israel                         | the Sage program                                   | 2/18/2020         | \$208.00       |
| Congregation Beth Shalom Rodfe Zedek             | capital fund                                       | 4/3/2020          | \$720.00       |
| Congregation Knesset Israel                      | Berkshire Jewish Film Festival                     | 2/11/2020         | \$2,000.00     |
| Congregation Kol Haverim                         | Honoring Gene Cantor with Circle of Membership     | 2/27/2020         | \$360.00       |
| Connecticut Children's Medical Center Foundation | COVID-19 Relief Fund - meals for healthcare worker | 3/29/2020         | \$1,800.00     |
| Connecticut Children's Medical Center Foundation | Glycogen Storage Disease General Operating Expense | 3/20/2020         | \$6,000.00     |
| Connecticut Children's Medical Center Foundation | Glycogen Storage Disease General Operating Expense | 3/20/2020         | \$7,000.00     |
| Connecticut Children's Medical Center Foundation | Glycogen Storage Disease General Operating Expense | 3/20/2020         | \$7,000.00     |
| Connecticut Immigrant and Refugee Coalition      | general operating support                          | 4/2/2020          | \$750.00       |
| Connecticut Immigrant and Refugee Coalition      | general operating support                          | 4/12/2020         | \$1,000.00     |
| Drew University                                  | Unrestricted - to support any needs of the Univers | 3/29/2020         | \$500.00       |
| Emunah of America                                | Afula emergency appeal                             | 4/6/2020          | \$250.00       |
| Father Joe's Village                             | general operating support                          | 3/13/2020         | \$1,000.00     |
| Federation Homes, Inc.                           | chair Zumba  | 2/11/2020         | \$1,500.00     |
| Federation Homes, Inc.                           | chair Zumba  | 2/12/2020         | \$1,500.00     |
| Federation Homes, Inc.                           | Food Trucks Fun                                    | 3/3/2020          | \$750.00       |
| Florida Studio Theater, Inc.                     | student matinee on March 6, 2020                   | 2/24/2020         | \$4,000.00     |
| Foodshare, Inc.                                  | food assistance for people affected by COVID-19    | 4/17/2020         | \$20,000.00    |
| Foodshare, Inc.                                  | the purchase of food and non-perishable items to s | 3/30/2020         | \$8,000.00     |

**Donor Advised Grants**  
**February 11, 2020 - April 19, 2020**

|   |   |           |             |
|---|---|-----------|-------------|
| Freedom For All                             | general operating support                         | 4/13/2020 | \$1,000.00  |
| Friends of Israel Defense Forces            | general operating support                         | 2/17/2020 | \$492.00    |
| Friends of Israel Defense Forces            | general operating support                         | 3/4/2020  | \$250.00    |
| Goodspeed Opera House Foundation, Inc.      | general operating support                         | 3/5/2020  | \$2,500.00  |
| Greater Hartford Community Foundation       | Ben Bronz Foundation (Birdies for Charity)        | 2/24/2020 | \$5,000.00  |
| Greater Hartford Legal Aid Foundation       | financial support for the provision of free legal | 3/3/2020  | \$1,000.00  |
| Hartford Symphony Orchestra                 | Young Artists Competition 2020                    | 3/12/2020 | \$1,000.00  |
| Hebrew Senior Care, Inc.                    | Behavioral Health Unit furniture                  | 2/11/2020 | \$6,000.00  |
| Hebrew Senior Care, Inc.                    | Behavioral Health Unit renovations                | 3/10/2020 | \$500.00    |
| Hillel: The Berman Jewish University Center | Campus Superstar                                  | 2/24/2020 | \$2,500.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/25/2020 | \$1,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/25/2020 | \$1,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/25/2020 | \$2,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/25/2020 | \$50,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/26/2020 | \$500.00    |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/27/2020 | \$250.00    |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/27/2020 | \$1,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/27/2020 | \$2,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/29/2020 | \$1,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/29/2020 | \$15,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/29/2020 | \$15,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/29/2020 | \$15,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/30/2020 | \$118.00    |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/30/2020 | \$2,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/30/2020 | \$2,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/30/2020 | \$10,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/30/2020 | \$10,000.00 |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 3/31/2020 | \$3,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 4/1/2020  | \$5,000.00  |
| Interfund Transfer                          | Jewish Hartford Rapid Relief and Recovery Fund    | 4/1/2020  | \$5,000.00  |



**Donor Advised Grants**  
**February 11, 2020 - April 19, 2020**

|  |  |           |             |
|--|--|-----------|-------------|
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/2/2020  | \$3,000.00  |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/2/2020  | \$5,000.00  |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/5/2020  | \$500.00    |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/8/2020  | \$250.00    |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/8/2020  | \$1,421.95  |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/8/2020  | \$3,578.05  |
| Interfund Transfer                         | Jewish Hartford Rapid Relief and Recovery Fund | 4/6/2020  | 1,000.00    |
| JAFCO Foundation                           | general operating support                      | 3/29/2020 | \$3,000.00  |
| Jewish Association for Community Living    | Client Assistance Fund                         | 2/17/2020 | \$3,000.00  |
| Jewish Association for Community Living    | Client Assistance Fund                         | 3/3/2020  | \$1,000.00  |
| Jewish Association for Community Living    | computer upgrades                              | 3/13/2020 | \$1,000.00  |
| Jewish Association for Community Living    | general operating support                      | 3/25/2020 | \$6,472.00  |
| Jewish Association for Community Living    | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Association for Community Living    | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Association for Community Living    | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Association for Community Living    | general operating support                      | 4/2/2020  | \$4,000.00  |
| Jewish Family Services of Greater Hartford | computer upgrades                              | 2/24/2020 | \$4,000.00  |
| Jewish Family Services of Greater Hartford | computer upgrades                              | 3/13/2020 | \$1,000.00  |
| Jewish Family Services of Greater Hartford | Embrace a Child                                | 2/11/2020 | \$500.00    |
| Jewish Family Services of Greater Hartford | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Family Services of Greater Hartford | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Family Services of Greater Hartford | general operating support                      | 3/29/2020 | \$4,000.00  |
| Jewish Family Services of Greater Hartford | general operating support                      | 4/3/2020  | \$3,500.00  |
| Jewish Family Services of Greater Hartford | JETS   | 4/3/2020  | \$3,000.00  |
| Jewish Family Services of Greater Hartford | the kosher food pantry                         | 3/18/2020 | \$2,126.00  |
| Jewish Federation of Greater Hartford      | annual campaign - Barbara Brown                | 2/11/2020 | \$5,000.00  |
| Jewish Federation of Greater Hartford      | annual campaign - David Brown                  | 2/11/2020 | \$5,000.00  |
| Jewish Federation of Greater Hartford      | Children's Reading Partners                    | 2/21/2020 | \$10,000.00 |
| Jewish Federation of Greater Hartford      | Conference Room TV and Webcam                  | 2/11/2020 | \$1,000.00  |
| Jewish Federation of Greater Hartford      | Dignity Project                                | 3/16/2020 | \$500.00    |

**Donor Advised Grants**  
**February 11, 2020 - April 19, 2020**

|  |  |           |             |
|--|--|-----------|-------------|
| Jewish Federation of Greater Hartford                  | general operating support                                  | 2/11/2020 | \$6,408.00  |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 2/14/2020 | \$10,000.00 |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 2/20/2020 | \$1,650.00  |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 3/29/2020 | \$5,000.00  |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 3/29/2020 | \$5,000.00  |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 3/29/2020 | \$5,000.00  |
| Jewish Federation of Greater Hartford                  | general operating support                                  | 3/29/2020 | \$5,000.00  |
| Jewish Federation of Greater Washington                | COVID-19 Response Fund                                     | 4/8/2020  | \$5,000.00  |
| Jewish Federation of Greater Washington                | general operating support                                  | 4/6/2020  | \$5,000.00  |
| Jewish Federation of Greater Washington                | Jewish Community COVID-19 Response Fund                    | 3/27/2020 | \$500.00    |
| Jewish Historical Society of Greater Hartford          | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Jewish Historical Society of Greater Hartford          | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Jewish Historical Society of Greater Hartford          | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Jewish Social Service Agency                           | PPE's for home health care and hospice workers             | 4/8/2020  | \$2,500.00  |
| Jewish Social Service Agency                           | retention of mental health therapists in Northern Virginia | 4/8/2020  | \$7,500.00  |
| Joyce D. and Andrew J. Mandell Jewish Community Center | general operating support                                  | 2/11/2020 | \$365.00    |
| Joyce D. and Andrew J. Mandell Jewish Community Center | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Joyce D. and Andrew J. Mandell Jewish Community Center | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Joyce D. and Andrew J. Mandell Jewish Community Center | general operating support                                  | 3/29/2020 | \$2,000.00  |
| Joyce D. and Andrew J. Mandell Jewish Community Center | Twinkle Toes   | 2/11/2020 | \$1,500.00  |
| Leadership Greater Hartford                            | general operating support                                  | 3/27/2020 | \$1,500.00  |
| MakerSpaceCT   | COVID-19 PPE project                                       | 4/1/2020  | \$1,000.00  |
| MakerSpaceCT   | support COVID 19 PPE production                            | 4/6/2020  | \$1,000.00  |
| Maurice Greenberg Center for Judaic Studies            | Holocaust education  | 2/11/2020 | \$250.00    |
| National Foundation for the Centers for Disease        | COVID 19 Response  | 4/13/2020 | \$250.00    |
| New England Jewish Academy                             | general operating support                                  | 2/12/2020 | \$540.00    |
| New England Jewish Academy                             | general operating support                                  | 2/17/2020 | \$1,000.00  |
| New England Jewish Academy                             | general operating support                                  | 2/28/2020 | \$200.00    |
| New England Jewish Academy                             | Purim fundraiser   | 2/17/2020 | \$360.00    |
| Newton Centre Minyan                                   | COVID-19 Relief Fund                                       | 3/27/2020 | \$250.00    |

**Donor Advised Grants**  
**February 11, 2020 - April 19, 2020**

|  |   |           |                     |
|--|---|-----------|---------------------|
| NewYork-Presbyterian                             | Covid -19 Patient Care Fund                             | 4/3/2020  | \$2,500.00          |
| Out to Pasture Farm and Rescue                   | general operating support                               | 2/12/2020 | \$1,000.00          |
| Playing on Air                                   | to encourage Jewish actors and playwrights              | 3/3/2020  | \$5,000.00          |
| Roswell Park Alliance Foundation                 | general purposes in support of Jeff Bauer's Empire Ride | 2/26/2020 | \$250.00            |
| Solomon Schechter Day School of Greater Hartford | Capture a Young Child's Imagination                     | 2/11/2020 | \$636.00            |
| Solomon Schechter Day School of Greater Hartford | Capture a Young Child's Imagination                     | 2/12/2020 | \$1,500.00          |
| Solomon Schechter Day School of Greater Hartford | general operating support                               | 3/20/2020 | \$360.00            |
| Solomon Schechter Day School of Greater Hartford | general operating support                               | 3/30/2020 | \$1,000.00          |
| Solomon Schechter Day School of Greater Hartford | Ner Tamid   | 2/17/2020 | \$1,141.00          |
| Temple Sinai                                     | general operating support                               | 4/17/2020 | \$1,500.00          |
| Tides Foundation                                 | general operating support                               | 4/17/2020 | \$1,000.00          |
| Town of Bloomfield                               | Food Bank   | 4/3/2020  | \$1,000.00          |
| Town of West Hartford Social Services Dept.      | The Town That Cares Fund                                | 3/25/2020 | \$1,000.00          |
| Trinity College Hillel                           | The Rise of Anti-Semitism in America                    | 2/11/2020 | \$3,000.00          |
| Trinity College Hillel                           | The Rise of Anti-Semitism in America                    | 2/11/2020 | \$3,000.00          |
| United Nations Foundation                        | WHO Covid -19 Fund                                      | 4/3/2020  | \$2,500.00          |
| University of Hartford Hillel                    | Social Justice Seder                                    | 2/12/2020 | \$2,500.00          |
| Village for Families and Children                | girl within programming                                 | 4/12/2020 | \$500.00            |
| Voices of Hope                                   | Survivors Travel Exhibit                                | 2/12/2020 | \$1,886.00          |
| Yad Chesed Fund                                  | general operating support                               | 4/13/2020 | \$1,000.00          |
| Young Israel of West Hartford                    | general operating support                               | 2/17/2020 | \$540.00            |
| Young Israel of West Hartford                    | general operating support                               | 2/21/2020 | \$1,800.00          |
| Young Israel of West Hartford                    | in honor of Golden Anniversary                          | 3/4/2020  | \$360.00            |
| <b>TOTAL</b>                                     | <b>142 Grants</b>                                       |           | <b>\$454,310.00</b> |

**Designated Grants**

**February 11, 2020 - April 19, 2020**

| <b>Grantee</b>   | <b>Program Name</b>                        | <b>Grant Date</b> | <b>Grant Amount</b> |
|--|--|-------------------|---------------------|
| Hebrew Senior Care, Inc.                               | Behavioral Health Unit renovation          | 2/28/2020         | \$588.00            |
| Hebrew Senior Care, Inc.                               | BHU renovations                            | 3/3/2020          | \$50,000.00         |
| Jewish Community Foundation of Greater Hartford        | food purchases for COVID-19 relief efforts | 4/3/2020          | \$4,800.00          |
| Jewish Federation of Greater Hartford                  | cemetery maintenance 1/1/20 - 3/31/20      | 3/31/2020         | \$13,885.64         |
| Joyce D. and Andrew J. Mandell Jewish Community Center | food purchases for COVID-19 relief efforts | 4/2/2020          | \$1,166.30          |
| Joyce D. and Andrew J. Mandell Jewish Community Center | Jonathan's Dream playground                | 2/25/2020         | \$2,500.00          |
| Solomon Schechter Day School of Greater Hartford       | general operating support                  | 3/12/2020         | \$35,000.00         |
| University of Connecticut Foundation, Inc.             | Susan Hope Sherman Scholarship Award       | 3/12/2020         | \$1,500.00          |
| <b>TOTAL</b>   | <b>8 Grants</b>                            |                   | <b>\$109,439.94</b> |

THE RAPID RELIEF AND RECOVERY FUND  
As of 04/23/20

|  | The FUND<br>Total<br>Raised<br>a/o 4/23/20 | Emergency<br>Needs | HFL<br>Total<br>Raised | Total<br>cash rec'd<br>a/o 4/17/20 | Status | notes | Money at<br>JCF   |
|--|--|--------------------|------------------------|------------------------------------|--------|-------|---|
| Income (incl 150k seed \$ from JCF & JFGH) | 841,194.00                                 | 691,194.00         | 150,000.00             | 610,363.00                         |        |       | 56,078.00 ACH<br>145,447.00 ACH (includes fed 50k)<br>255,368.00 DAF (includes JCF 100k)<br>95,369.00 ACH 04/20/20<br>10,500.00 DAF (to be applied against receivable still)<br>58,101.00 ACH |
| Expenses                                   |  |                    |                        |                                    |        |       |   |
| Assistance Payments (paid out)             |  | (4,650.00)         |                        | (4,650.00)                         |        |       |   |
| Food and Other                             |  |                    |                        |                                    |        |       |   |
| Catered meals                              |  | (12,114.98)        |                        | (12,114.98)                        |        |       | 620,863.00 10,500.00 difference is the DAF that not tak   |
| Food                                       |  | (8,706.52)         |                        | (8,706.52)                         |        |       |   |
| Other                                      |  | (6,708.24)         |                        | (6,708.24)                         |        |       |   |
| sutotal all expenses                       |  | (32,179.74)        |                        | (32,179.74)                        |        |       |   |
| Remaining for Future                       | 659,014.26                                 | 150,000.00         | 578,183.26 *           |                                    |        |       | 620,863.00  |

|       |                             |                    |                    |           |     |
|-------|-----------------------------|--------------------|--------------------|-----------|-----|
| Meals | Catered Food Expesnes       |                    |                    |           |     |
|       | Yosi Kosher Caterers        | (1,500.00)         | (1,500.00)         | pd by JCF | n/a |
|       | Borenstein Caterers (El Al) | (5,814.98)         | (5,814.98)         | pd by JCF | n/a |
|       | AbleAbelAbel                | (4,800.00)         | (4,800.00)         | pd by JCF | n/a |
|       |                             | <u>(12,114.98)</u> | <u>(12,114.98)</u> |           |     |

## Food delivery expenses

|                                |                             |            |            |                        | reimbursed<br>request |
|--------------------------------|-----------------------------|------------|------------|------------------------|-----------------------|
| JCC                            | JCC (KMF Kosher Mart foods) | (236.58)   | (236.58)   | paid                   | #1                    |
| JCF                            | JCF (Elana's cc)            | (895.85)   | (895.85)   | paid                   | #1                    |
| JFGH                           | JFGH (Heather cc)           | (1,233.11) | (1,233.11) | tbpd                   |                       |
| JCC                            | Kosher Mart                 | (1,018.58) | (1,018.58) | pd by JCF              | n/a                   |
| JCC                            | Sysco                       | (147.72)   | (147.72)   | pd by JCF              | n/a                   |
| JCC                            | Sysco                       | (594.74)   | (594.74)   | paid received 04/20/20 | #1                    |
| JCC                            | Sysco bags                  | (50.93)    | (50.93)    | to be paid             |                       |
|                                | Crown                       | (1,530.30) | (1,530.30) | paid                   |                       |
|                                | JFGH (Heather cc) food      | (738.26)   | (738.26)   | tbpd received 04/20/20 | #1                    |
|                                | JFGH (Carries cc) food      | (114.95)   | (114.95)   | tbpd received 04/20/20 | #1                    |
|                                | JFGH (Jennifer's cc) food   | (578.04)   | (578.04)   | tbpd received 04/20/20 | #1                    |
|                                | Dignity bags                | (1,567.46) | (1,567.46) | pd by JFGH             | #1                    |
| Envoy America (transportation) |                             |            |            |                        |                       |
| total                          |                             | (8,706.52) | (8,706.52) |                        |                       |

Other

|                  |                   |                   |      |               |
|------------------|-------------------|-------------------|------|---------------|
| k95 masks        | (3,800.00)        | (3,800.00)        | tbpd | on David's CC |
| credit card fees | (2,908.24)        | (2,908.24)        | paid |               |
|                  | <u>(6,708.24)</u> | <u>(6,708.24)</u> |      |               |



Federation Requests for Reimbursement

|    |                     |                  |
|----|---------------------|------------------|
| #1 | through 04/22/20    |                  |
|    | assistance payments | 4,250.00         |
|    | pd to JCC           | 831.32           |
|    | pd to JCF           | 895.85           |
|    | Dignity/Hygiene     | 1,567.46         |
|    | k95 Masks           | 3,800.00         |
|    | food                | 1,431.25         |
|    | total               | <u>12,775.88</u> |

# Jewish Hartford

## Rapid Relief & Recovery Fund



## Communications Plan

### OVERVIEW & RATIONALE

Our community is dealing with unprecedented challenges during the COVID-19 pandemic. To help alleviate the negative impacts on our community, Federation and Foundation staffs will address urgent and emerging needs by instituting the ***Jewish Hartford Rapid Relief and Recovery Fund*** (the Fund). Staff and committee member efforts to raise money for the Fund and support our community will span several months.

For this effort, both staffs will provide positive, helpful information to constituents through personalized phone calls and emails, and via digital media (Facebook, community eblasts) and traditional media channels (newspapers, TV stations). We will listen, empathize and respond to our donors so they can support the causes that matter most to them and be inspired by our outreach and results. Our engaging communications and meaningful outcomes will offer hope, help and healing from this pandemic. Ultimately, Federation and Foundation will strengthen Greater Hartford's resilient Jewish community and our relationships with constituents.

### COMMUNICATIONS GOALS TO SUPPORT THE FUND

- Create awareness of the Fund
- Elevate trust and affinity of both Federation and Foundation

### TARGET AUDIENCES

- Primary: donors, lay leaders, trustees, volunteers, community members
- Secondary: general public

### MARKETING AND COMMUNICATIONS APPROACH

Marketing staffs of Federation and Foundation are collaborating alongside their CEOs, staff members and committee members to achieve above listed goals via an overlapping, three-phased approach: Phase One: launch (media relations and community communications), Phase Two: additional tools for personal solicitations, and Phase Three: impact communications and ongoing appeals.

### PHASE ONE: LAUNCH

- Convey urgency and importance to primary audiences to create two committees and jointly launch the Fund to support the Jewish community
- Develop key messages regarding why we started the Fund and what it will support
- Launch proactive media relations effort to accurately educate audiences about the Fund and inspire action to support the Fund

In addition to strategy discussions via phone and email, marketing teams produced these work assets and activities for Phase One:

| <b>ASSET/WORK ACTIVITY</b>  | <b>COMPLETED</b>   |
|---|--------------------|
| Letter to community leaders announcing establishment of the Fund  | March 23           |
| Brand palette design for joint communications   | March 24           |
| Foundation website page and carousel about Fund with link to Federation donation page; supporting graphics for partner websites | March 24           |
| Online donation landing page, embedded form, and automated gift acknowledgment email  | March 25           |
| Q&A briefing document for key stakeholders  | March 25           |
| Announcement of the Fund/initial eblast appeal  | March 26           |
| Press release   | March 26           |
| Social media plan and launch  | March 26           |
| Proactive media outreach  | March 26 – April 7 |
| Script for solicitation calls   | March 26           |
| Media alert   | April 2            |
| Fund appeal video   | April 2            |

We continued contacting media outlets the weeks of March 30 and April 6 asking them to either post our press release or produce their own story about the Fund. Separate outreach is planned around COVID-19 assistance and volunteer opportunities supported by the Fund; they will have their own communications plans.

Marketing and Development staffs will work together to further articulate the focus, purpose and impact of the Fund, which is intended to be fluid and responsive to emerging needs. As new developments unfold, marketing staffs will produce milestone announcements to keep audiences educated, inspired and engaged in supporting the Fund. Examples include: receiving a series of major donations, creating a humanitarian volunteer effort or announcements about granting funds and their impact. Some milestones will require media relations outreach to local news outlets while others may be only for social media communications. We will review and assess these milestones on a case-by-case basis.

#### PHASE TWO: ADDITIONAL SOLICITATION TOOLS

Members of the Fundraising Committee will be using Zoom and PowerPoint slides to connect with potential major donors about the Fund. They will need assistance with their presentation and messaging, which should first stress the critical need for donors to continue supporting their organizations and synagogues at their current levels, and only then consider making an additional gift to the Fund. Federation staff will be leading this effort.

|                                     |   |
|-------------------------------------|---|
| Speaking points for Fund solicitors | March 26  |
| PowerPoint deck for Fund solicitors | April 6   |
| Zoom training for Fund solicitors   | As needed – please contact Bob Friedman at Federation |

### PHASE THREE: IMPACT COMMUNICATIONS & ONGOING APPEALS

Sharing the Fund’s impact will be critical to the continued success of the fundraising effort. Phase Three is cyclical and will evolve based on the Fund’s grantmaking and Fund-supported program outputs and outcomes (provision of kosher food, hygiene products, reassurance calls).

As stories are developed and approved, we will distribute the content in accordance with content marketing best practices, i.e., across multiple channels and platforms, adjusting length, style, and tone to fit the audience without altering facts. As Fund development progresses, impact stories will form the basis of our appeals, including but not limited to weekly eblast appeals, ongoing social media updates, weekly updates to speaking points and other solicitation materials, and press releases to announce milestone successes. All mass communications will feature a clear call to action with a link to the online donation page.

We may also repurpose Fund impact stories in independent Federation and Foundation communications (e.g., Shabbat messages, monthly e-newsletters, annual reports). Each organization will clearly acknowledge its partnership with the other.

|   |   |
|---|---|
| Impact story development  | Begins April 1; ongoing   |
| Impact story distribution via weekly eblast appeals, an ongoing social media campaign, and weekly updates to speaking points and other solicitation materials | Begins April 7; ongoing (weekly stand-alone ebasts every Tuesday)   |
| Press releases to announce milestone successes  | As deemed appropriate; TBD by Fund Development Cabinet, Grantmaking Committee, and Foundation and Federation leadership |

# **Jewish Hartford**

## **Rapid Relief & Recovery Fund**



## **MEDIA PLACEMENTS**

### **BROADCAST**



<https://www.fox61.com/article/news/health/coronavirus/connecticut-coronavirus-covid19-updates-cases/520-2bd2a3cc-1004-4f1f-afc5-8c5778d079a6>

## **Jewish groups team up to deliver kosher meals for Passover**

While many are stuck inside of their homes during Passover, two local organizations are making sure they still receive a meal.

The Jewish Community Foundation and the Jewish Federation came together to deliver 1,500 kosher meals.

Those meals went to the elderly, Holocaust survivors, people who are homebound and also those who are financially struggling. They spent the day delivering to families in the Greater Hartford region.

The two organizations have created the "Jewish Hartford Rapid Relief and Recovery Fund" to help those in need during this pandemic.

If you would like to donate to the fund or are in need, [click here](#).



TV Clip:

[https://www.wfsb.com/local-connecticut-communities-get-creative-to-celebrate-passover/video\\_f066e2c2-7101-52b9-8e92-494e0d5aba78.html](https://www.wfsb.com/local-connecticut-communities-get-creative-to-celebrate-passover/video_f066e2c2-7101-52b9-8e92-494e0d5aba78.html)

Website story:

[https://www.wfsb.com/news/passover-being-impacted-due-to-covid-19-pandemic/article\\_ce3bb082-790d-11ea-9c6c-db82dcb1f0e0.html](https://www.wfsb.com/news/passover-being-impacted-due-to-covid-19-pandemic/article_ce3bb082-790d-11ea-9c6c-db82dcb1f0e0.html)

## **Passover being impacted due to COVID-19 pandemic**

By Elliott Polakoff, April 9

HARTFORD, CT (WFSB) – One of the biggest Jewish holidays of the year starts on Wednesday.

Whether it's Passover meals or Passover services, things are going to be a little different this year.

Passover is all about spending time with loved ones, but that takes on a different meaning during the COVID-19 pandemic.

"This is crisis management and we have to do anything we possibly can to help the people in our community get through this," said Jacob Schreiber, President and CEO of the Jewish Community Foundation of Greater Hartford.

The Jewish Federation and Jewish Community Foundation of Greater Hartford worked together to deliver 1,500 Kosher-for-Passover meals to any locals who might not currently have access to food.

"When we tell them that we're going to be delivering food to them, many of them have cried. They're literally so worried about where they're going to receive food, and how they're going to perform for the holiday and they're deeply emotional," said David Warren, President and CEO of Jewish Federation of Greater Hartford.

A little food goes a long way, but without being able to enjoy it with others at the Seder, or feast the kicks off Passover, the full experience remains incomplete. That's where synagogues are starting to get creative.

"A number of our families are having their own personal Zoom Seders, some have called it Zader. The idea is that on Passover, no one should be alone and if we can't be together in person, let's be together over the computers," said Michael Pincus, Rabbi at Congregation Beth Israel.

Whether in front of a screen or in front of a doorstep, the plan for all of the Jewish organization is to keep being together for the entirety of this COVID-19 pandemic.

"The food service is going to go on. The financial assistance that we are giving to our institutions is going to happen and the phone calls are definitely going to happen," Schreiber said.

No one wants this to become to new Passover, but the important thing is that people are coming together to make this Passover one to remember.



TV clip:

<https://www.nbcconnecticut.com/news/local/jewish-community-leaders-providing-passover-food-assistance/2251841/>

Website story:

<https://www.nbcconnecticut.com/news/local/jewish-community-leaders-providing-passover-food-assistance/2251841/>

## Jewish Community Leaders Providing Passover Food Assistance

Nearly \$1 million was raised to provide Seder meals and other support to members of the Jewish community as Passover approaches.

By Mike Massaro April 7, 2020



The Jewish Federation of Greater Hartford and the Jewish Community Foundation of Greater Hartford are teaming up to distribute Seder meals to those who in need.

The Jewish Federation and the Jewish Community Foundation of Greater Hartford have joined forces to provide relief efforts during this trying time. They say they've raised three-quarters of \$1 million to provide financial assistance, social services and on Tuesday, food for those in need.

"We've had people on the phone crying when they literally hear we're able to provide this," said David Warren, president and CEO of the Jewish Federation of Greater Hartford.

With Passover beginning Wednesday, faith leaders in the Greater Hartford Jewish community were packing grocery bags and making deliveries, providing Seder meals for those who might be struggling.

"We bought about 1,500 kosher for Passover meals and we have catered meals as well," said Jacob Schreiber, president and CEO of the Jewish Community Foundation of Greater Hartford.

The Jewish Federation says its staff – normally comprised of educators and social service providers - have transformed completely in the past two weeks to become food logistics experts.



“What we’re seeing today, despite all of the social isolation, despite all of the challenges, is an incredible spirit of volunteerism,” said Waren.

That staff packed cars with food Tuesday, helping people who might not otherwise be able to have a traditional Seder meal.

“There are homebound seniors. There’s people that can’t get out and there’s people that just need extra help,” explained Schreiber.

Organizers say providing for their community is their core function, and being able to do it during these trying time means everything.

“A lot of people this is helping, is not only going to help them eat but hopefully brighten their holiday a bit too,” said Schreiber.

## ONLINE



### **Jewish Federation and Jewish Community Foundation Launch Fund to Help People Impacted by COVID-19 in Greater Hartford’s Jewish Community**

CT Council for Philanthropy

<https://www.ctphilanthropy.org/news/jewish-federation-and-jewish-community-foundation-launch-fund-help-people-impacted-covid-19>



### **Jewish Federation, Jewish Community Foundation Launch COVID-19 Relief and Recovery Fund**

Metro Hartford Alliance Newsroom

<https://www.metrohartford.com/about-us/newsroom/jewish-federation-jewish-community-foundation-launch-covid-19-relief-and-recovery-fund/>



## **Jewish Federation and Jewish Community Foundation Launch Fund to Help People Impacted by COVID-19 in Greater Hartford's Jewish Community**

We-ha.com

<https://we-ha.com/jewish-federation-and-jewish-community-foundation-launch-fund-to-help-people-impacted-by-covid-19-in-greater-hartfords-jewish-community/>

## **PRINT & ONLINE**

### **Journal Inquirer**

**Fund launched to help Hartford area Jewish community impacted by COVID-19**

**By Jessica Lerner**

Journal Inquirer (daily)

[https://www.journalinquirer.com/connecticut\\_and\\_region/fund-launched-to-help-hartford-area-jewish-community-impacted-by/article\\_a4a18282-702b-11ea-8d08-2bada5934a3a.html](https://www.journalinquirer.com/connecticut_and_region/fund-launched-to-help-hartford-area-jewish-community-impacted-by/article_a4a18282-702b-11ea-8d08-2bada5934a3a.html)

### **West Hartford NEWS**

**West Hartford organizations team to provide support to emergency, organizational needs due to corona virus**

West Hartford News (weekly)

[http://www.westhartfordnews.com/news/west-hartford-organizations-team-to-provide-support-to-emergency-organizational-needs-due-to-corona-virus/article\\_b9fc21db-864d-5244-b5b9-e06292cff3d9.html](http://www.westhartfordnews.com/news/west-hartford-organizations-team-to-provide-support-to-emergency-organizational-needs-due-to-corona-virus/article_b9fc21db-864d-5244-b5b9-e06292cff3d9.html)

### **CT JEWISH Ledger**

**Hartford Jewish agencies launch fund to help those impacted by COVID-19**

CT Jewish Ledger (weekly)

<http://www.jewishledger.com/2020/03/hartford-jewish-agencies-launch-fund-to-help-those-impacted-by-covid-19/>

### **West Hartford NEWS**

## The J Factor: Finding inspiration amid isolation

By Jacob Schreiber

West Hartford News

[http://www.westhartfordnews.com/opinion/the-j-factor-finding-inspiration-amid-isolation/article\\_863c19df-dcfd-5230-bb6d-4615130fa908.html](http://www.westhartfordnews.com/opinion/the-j-factor-finding-inspiration-amid-isolation/article_863c19df-dcfd-5230-bb6d-4615130fa908.html)

**Hartford  
Courant**

## Fund Launched to Help Jewish Community Cope with Coronavirus By Steve Smith, Community section



By STEVE SMITH  
HARTFORD COURANT | APR 10, 2020 | 1:30 PM | WEST HARTFORD



Carrie Berman, Coordinator, Educational

Services and Young Emissary Program at the Jewish Federation of Greater Hartford, packs up food for delivery.

Very quickly after the coronavirus began affecting people's daily lives, the Jewish Federation and Jewish Community Foundation started a fund to help people, and even re-organized some of what they do for the cause.

David Waren, president and CEO of the Jewish Federation of Greater Hartford, and Jacob Schreiber, president and CEO of the Jewish Community Foundation of Greater Hartford, said the Jewish Hartford Rapid Relief and Recovery Fund was created to be able to provide financial assistance as quickly as possible to individuals in the Jewish community who are under financial distress because of COVID-19, as well as agencies who are providing crucial social services.

The two organizations not only launched the fund, but seeded it with \$150,000 from existing resources and received an additional \$145,000 from generous donors.

The fund will serve people in approximately 30 cities and towns in the Greater Hartford area.

“A major focus is food security,” Warren said. “It’s ensuring that individuals, particularly the elderly in the community... have access to food. We are delivering to hundreds of seniors and others who are shut-in during this crisis, groceries and prepared meals.”

Some of the funds will go to providing behavioral health counseling for local people in crisis, supplying financial assistance for basic needs, and vital social services to individuals and families affected by COVID-19, including some no-interest loans.

“We have to be flexible, and we’re learning every day, because every day is a new challenge,” Schreiber said, adding that there have already been a variety of ways in which staffers have acquired food and he expects the need to become as many as 150 people.

While some people being helped by the fund have been receiving services through Jewish Family Services, many who have not received any sort of social services before have begun to express a need. The organizations themselves have begun to restructure internally, with existing staff, to better identify and help people in need.

“We are also mobilizing a cadre of staff and volunteers to reach out to those who are socially isolated, particularly the elderly, to make sure that there is regular engagement in them,” Warren said. “We’ve moved rapidly into the business of making sure core social service needs are provided for.”

“It’s not business as usual, due to this virus, and we are actually living that concept,” Schreiber said “We are now re-purposing staff to be working in ways that they were not hired for. We have people with social services backgrounds and financial backgrounds. It’s great to see our staff and the staffs of synagogues and everyone involved in this step up to the plate and do what has to be done.”

“At a later stage,” Schreiber said, “we are also hoping to be able to help our community partners - synagogues and Jewish agencies – with transitional support, as needed.”

Passover, the most-celebrated Jewish holiday, has a special meaning in this time, and the fund is providing holiday needs, as well.

“The first thing in the Seder is to say, ‘Let all those who are hungry come eat’ Schreiber said. “We are certainly taking that literally and serving those people now.”

To donate to the Fund, or for more information, visit

<https://www.jewishhartford.org/rapid-relief-recovery-fund>