

BOARD OF TRUSTEES MEETING AGENDA

August 26, 2021

1. WELCOME & GOOD & WELFARE (4:30-4:50) – Gayle

2. CONSENT AGENDA (4:50-4:55) -- Gayle
 - 🌀 Minutes of June 17, 2021 Board Meeting pg. 3
 - 🌀 Approval to Invoke Variance Clauses on Center for Innovative Philanthropy Funds pg. 10

3. BUDGET COMMITTEE REPORT (4:55-5:05) - Elysa pg. 12
 - 🌀 Update on FY2021 Budget
 - 🌀 Review updates to the FY2022 Budget*

4. PRESIDENT’S REPORT (5:05-5:15)* -- Jacob pg. 40

5. 50TH ANNIVERSARY UPDATE (5:15-5:35) -- Gayle and Jacob pg. 45
 - 🌀 Overview
 - 🌀 Community Mosaic Project

6. DEVELOPMENT REPORT (5:35-5:50) - Kathryn
 - 🌀 DAF Task Force Proposals* pg. 46
 - 🌀 Cemeteries 90/10 Rule Policy Amendment Proposal* pg. 48

7. GRANTS COMMITTEE REPORT (5:50-6:10) * – Sid and Michael pg. 50

8. INVESTMENT COMMITTEE REPORT (6:10-6:20) pg. 90

9. EXECUTIVE SESSION (6:20-6:30)

Additional Materials:

- 🌀 New JCF General Brochure (pdf) pg. 104
- 🌀 Grant Reports pg. 106

*Items requiring a Board vote

Consent Agenda:

- Minutes of June 17 meeting
- Invoking variance clauses on CIP funds



Board of Trustees

Minutes of June 17, 2021

Call to order: 4:33 p.m. Adjournment: 6:40 p.m.

Presiding: Gayle W. Temkin, Chair

Recording: M. Leighty

Present: Gerald B. Goldberg; Ethan Goldman; Joshua Gottfried; Elysa L. Graber-Lipperman; Walter L. Harrison; Leigh A. Newman; Merrill Mandell; Rachel S. Rubin; Cyral A. Sheldon; Julie R. Spivak; Gayle W. Temkin; Sidney Ulreich; Robert K. Yass; Carolyn Gitlin, *ex-officio*.

Absent: Jessica L. Fish, Randall H. Weinstock, Blanche Goldenberg.

Also Attending (non-voting): Joy Zinn, scholarship recipient; Tom Divine, Life Trustee; Robert Goldfarb, Life Trustee; Jacob Schreiber, President & CEO; Michael Elfenbaum, Vice President, Grant Programs; Kathryn Gonnerman, Vice President, Philanthropy; Susan Lotreck, Vice President, Donor Services; Rhona Morgan, Vice President, Finance; Maureen O'Connell, Marketing Director; Elana MacGilpin, Development and Stewardship Officer; Madison Leighty, Development Assistant.

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
Welcome and Chair's Remarks	<p>Ms. Temkin called the meeting to order at 4:33 p.m. She congratulated Ms. Gitlin on being elected chair of the JFNA Women's Philanthropy Board. She also congratulated Ms. Mandell on her election to the same board and on the bat mitzvah of Ms. Mandell's daughter. She wished Mr. Yass a happy 70th birthday. She extended condolences to Alan Mendelson, former Trustee and current member of the Grants, Budget & Finance, and Audit Committees, and his family on the passing of his brother-in-law Samuel "Sandy" Ziploff.</p> <p>Ms. Temkin thanked and congratulated Ms. Newman for her 13 years of service on the Board of Trustees, including her 5-year term as Board chair, and Mr. Weinstock on his 6 years of service, including 5 years as</p>		

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
	treasurer. Ms. Newman and Mr. Weinstock's terms finish at the end of FY2021.		
Consent Agenda Minutes of April 22, 2021 meeting	Ms. Temkin directed the Trustees' attention to the minutes of the April 22, 2021 meeting.	The meetings of the April 22, 2021 meeting were approved on consent.	The minutes of the April 22, 2021 meeting will be filed in the corporate notebook.
President's Report	<p>Mr. Schreiber extended well wishes to Ms. Temkin for her recovery from surgery and thanked her for her continued support of JCF as she recovers.</p> <p>Mr. Schreiber presented his report of Foundation activities since the last meeting, emphasizing the harmony of the Foundation's actions with the goals set out in the 2019 Strategic Plan. Grants from DAFs are up \$787,000 from last year; he noted that it is difficult draw year-over-year conclusions from these numbers because of the unique circumstances caused by the pandemic. For example, interfund grants this year decreased from \$304,000 to \$2,750, mostly due to last year's development of the Rapid Relief and Recovery Fund. Designated and unrestricted grants are also higher this year (by \$150,000 and \$131,000, respectively), also due to unique circumstances over the last year, such as one-time grants from designated funds upon agency request and the suspension of the Community Grants program in March 2020. This year's donations as of May 31 were \$6.3 million, compared to \$7.1 million last year. Mr. Schreiber noted that both numbers are higher than donation numbers from every year since 2014. He thanked the full JCF staff for their hard work and stewardship efforts. The Foundation's total asset value, as of June 16, was \$168.6 million, an all-time high for the Foundation. He noted the continuing climb of the stock market and thanked the Budget & Finance Committee for their strategy during last year's market turbulence.</p>		

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
	Mr. Schreiber discussed the Accelerating Charitable Efforts Act introduced in Congress, which seeks to accelerate giving from DAFs by changing distribution and/or tax deduction policies. He explained the Foundation's position against the bill, noting that data shows that DAF holders spend beyond the standard 4-5% distribution rate spent by family foundations and explaining concerns that the bill would disincentivize giving to DAFs by imposing further administrative hurdles. He noted that there is an exemption for community foundations in the bill, which would only affect DAFs over \$1 million.		
Grants Committee Report Community Grants Program Eligibility Proposal for Synagogues	Mr. Ulreich introduced the proposed change to the Community Grants Program for synagogues. Noting that there is currently \$417,846 available for grantmaking, he summarized the work of the task force that explored the expansion of the synagogue grant program. Given data received through JMAP and the experience of helping synagogues during the pandemic with the Rapid Relief Fund, the task force recommended changing the maximum limit for annual synagogue grants from \$2,000 to \$10,000, intended for innovative and creative opportunities to enhance the experience of synagogues and their members. This change would only apply to synagogues. He and Mr. Elfenbaum thanked the task force for their work. Trustees discussed considerations including synagogue size, programming criteria, and encouraging collaborative programming.	Upon motion, duly made and seconded, the Trustees unanimously approved the new eligibility guidelines for synagogues, including increasing the annual amount of dollars available to them via the grant process from \$2,000 to \$10,000.	Specific criteria will be established for the expanded synagogue grant program. All grants will continue to be considered and recommended by the Grants Committee.
Grant Proposal for New England Jewish Academy	Mr. Ulreich introduced the proposed grant to New England Jewish Academy for the Reggio Emilio Early Childhood program and reviewed the Grants Committee's discussions with NEJA about budget and implementation of the program. Trustees considered the existing Reggio Emilio program at the Solomon	Upon motion, duly made and seconded, the Trustees unanimously approved a grant of \$60,000 to NEJA for the Reggio Emilio Early Childhood program.	

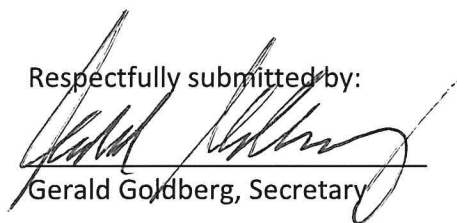
Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
Grant Proposal for Jewish Association for Community Living	<p>Schechter Day School, the growth of the Greater Hartford Orthodox community, and the program's attraction for Orthodox families considering moving to the area.</p> <p>Mr. Ulreich described the proposed grant to the Jewish Association for Community Living for office relocation from the HARC building. Although the capacity-building grant was outside the normal Community Grants Program guidelines, the Grants Committee found it acceptable and reasonable to recommend such a grant in this circumstance. JCL had previously contracted back-office services from HARC while sharing the building, but a 130% increase in the cost of services prompted JCL to relocate to Bloomfield. The board of the Jewish Federation is considering a similar grant to cover the remaining costs of the move. Trustees discussed the usage of the grant and emphasized the community's need for organizations like JCL that care for the most vulnerable.</p>	<p>Upon motion, duly made and seconded, the Trustees unanimously approved a grant of \$23,500 to JCL for the office move.</p>	
Budget & Finance Committee Report	<p>Ms. Graber-Lipperman thanked the staff for their work and summarized the recent meeting of the Budget & Finance Committee. Revenue was slightly (0.48%) above the anticipated revenue, at \$844,214. Total operating expenses were \$785,266, or 9.4% favorable, attributable to limitations on activities brought about by COVID-19 and timing at the end of Q2. Personnel expenses, at \$627,452, reflected a 2.05% positive variance attributable to bonuses awarded to staff and changes to the staff insurance plan. General operating expenses, at \$96,176, were 25.01% favorable, mainly due to timing, and included the increase in occupancy costs discussed at the April 22 meeting. Development expenses were \$22,678, reflecting a positive variance of 63.82%. Overall, the operating surplus of \$58,948 was added to prior years' surplus, resulting in a net</p>	<p>Upon motion, duly made and seconded, the Trustees unanimously approved the FY2022 budget (and an additional \$50,000 payment toward paying ourselves back for the Aim Chai campaign).</p>	

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
	operating surplus carryforward of \$368,411. The committee recommended an additional \$50,000 payment toward the Aim Chai expense write-off. Ms. Graber-Lipperman noted that the \$233,900 PPP loan received by the Foundation had been fully forgiven; the amount will be placed in a grants reserve fund to be distributed on behalf of the community. Trustees reviewed the history of the Aim Chai expense write-off.		
Life & Legacy Update	<p>Ms. MacGilpin provided an update on Life & Legacy activities. The Foundation has a strong working partnership with 14 participating organizations across the Greater Hartford area. Current activities include marketing initiatives and conversations with organization boards about the program.</p> <p>Ms. Temkin, Mr. Goldberg, and Mr. Harrison each spoke about their legacy intentions through the Life & Legacy program. They encouraged other Trustees to join them in making legacy commitments, emphasizing the powerful example that lay leaders can set for the community at large. Ms. MacGilpin and Mr. Schreiber were also recognized for signing letters of intent for Life & Legacy.</p>		The Foundation's Life and Legacy Team will call Board members over the summer to have conversations about participating in the Life and Legacy initiative.
Development Strategy: The Next 18 Months	Ms. Gonnerman described development priorities for the next 18 months. The development team plans to cultivate giving through partnership with agencies and synagogues in the Life & Legacy and Endow Hartford 21 programs; donor stewardship and promotion of unrestricted/community action funds during the celebration of the Foundation's 50th anniversary; and updated parameters and donor education events for the donor-advised fund program. Ms. Gonnerman also described the Life & Legacy and Endow Hartford 21 programs, including the distinctions between the two, in further detail.		

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
<p>Scholarship Committee Report and Presentation</p> <p>Joy Zinn, Scholarship Recipient</p>	<p>Ms. Mandell updated Trustees on Scholarship Committee activities. This year, the Foundation granted \$83,000 from 16 scholarship funds to 32 students. Scholarship recipients were from 12 towns in the Greater Hartford area. Scholarships were granted to 19 women and 13 men, including 11 first-time applicants.</p> <p>Ms. Zinn, a recipient of the Ernest and Charlotte Hirst scholarship during her undergraduate studies at Pennsylvania State University and the Dr. Leizor and Barbara Kessel scholarship for her upcoming graduate studies at Bloomsburg University of Pennsylvania, thanked the Trustees for their support and spoke about her involvement in the Greater Hartford Jewish community and her educational experience.</p>		
<p>Community Security Grant Proposal</p>	<p>Mr. Schreiber introduced the proposed \$36,000 grant for the Jewish Hartford Secure Community Initiative. Recounting his experience as CEO of the Jewish Community Center of Greater Kansas City at the time of the 2014 fatal shootings at the KCJCC and the nearby Village Shalom retirement community, he expressed the importance of preventing and responding to security threats to the Greater Hartford Jewish community. The Jewish Federation has hired a security director in partnership with the national Security Community Network.</p>	<p>A motion was made to increase the grant from \$36,000 to \$50,000.</p> <p>Upon said motion, duly made and seconded, the Trustees unanimously voted to grant \$50,000 to the Jewish Federation to fund the Secure Community Initiative. Ms. Gitlin, who is the current chair of the Federation board, abstained from the vote.</p>	
<p>Governance Committee Report FY2022 Slate of Nominations for Board of Trustees</p>	<p>Ms. Mandell introduced the slate of nominations for Trustees for FY2022. Alan Solinsky and Naomi Baline Kleinman were nominated as new trustees. Ms. Mandell and Mr. Goldberg were nominated to continue their respective terms as vice president and secretary. Ms. Sheldon and Ms. Fish were each nominated to serve an additional 3-year term. Dave Miller was nominated as a Life Trustee.</p>	<p>Upon motion, duly made and seconded, the Trustees unanimously approved all Trustee nominations recommended by the Governance Committee.</p>	

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
	Ms. Mandell thanked Ms. Gitlin for her service as ex-officio Trustee. She will be replaced by Federation's Chair-elect, Dana Keller. Ms. Mandell also expressed her appreciation to Ms. Newman and Mr. Weinstock, who are cycling off the Board on June 30, for their service.		
Adjournment	Ms. Temkin thanked the Trustees and brought the meeting to a close at 6:40 p.m.		

Respectfully submitted by:



Gerald Goldberg, Secretary



Invoking Variances Clauses on Funds Supporting the Center for Innovative Philanthropy (CIP)

Proposal: Staff requests that the Board of Trustees adopt all the “Next Steps” detailed below, “on consent,” as part of the August 26, 2021 Board Meeting’s Consent Agenda.

Background

During its tenure, CIP provided a variety of meaningful services, including research and consulting to the community, and spearheaded the JMAP study. However, the 2020-2022 Strategic Plan refocused our organizational energies and budget to enhance fund development and grantmaking to best support these core foundation functions. In January 2020, the Foundation disbanded the CIP and spread some of its services among staff. As a result, funds whose purposes were to support the work of CIP – which has **ceased to exist** -- have become obsolete, meaning their Variance Clauses must be invoked so we can put the money remaining in these funds to other uses.

Below are the funds Foundation Staff have identified that require invoking the Variance Clause:

1. THE GOLDFARB FAMILY FOUNDATION FUND FOR THE CENTER FOR INNOVATIVE PHILANTHROPY.

“Purpose. The Fund will be used for general charitable or educational purposes and programs of the Jewish Community Foundation’s Center for Innovative Philanthropy (CIP), including but not limited to, for example, innovative or so-called “venture philanthropy” grants from the Foundation.”

“Variance power. If the Center for Innovative Philanthropy **ceases to exist**, the funds may be used for general charitable or educational purposes of the Foundation with a focus that is similar to the programs and projects funded during the life of the advisors.”

Next Step: The Foundation will invoke its variance power and rename this Fund the “Goldfarb Family Fund.” It will be used for general charitable or educational purposes of the Foundation with a focus that is similar to the programs and projects funded during the life of the advisors. As with the original Fund, Bob and Bill Goldfarb will serve as the advisors for the renamed Fund. Bob Goldfarb was consulted -- and supports this move.

2. JOHNSTON FAMILY FUND FOR THE CENTER FOR INNOVATIVE PHILANTHROPY

Established in November 2013 by the then Foundation CEO Michael Johnston, this Fund’s purpose was to support the work of CIP. Unfortunately, there is no record of a draft or signed agreement for this fund – either in Foundation records or Michael’s personal files. However, this Fund has been funded and operated as an endowment fund, disbursing gifts to CIP every year between 2016-2019.

Jacob spoke with Michael on 11/13/19 and advised him that CIP would **cease to exist** once the Strategic Plan was approved at our December 2019 Board meeting. Michael requested that the remaining proceeds of this fund be transferred to the Johnston Family Unrestricted Fund. This conversation is documented in our data base.

Next Step: Dissolve the Johnston Family Fund for CIP and place the funds into the Johnston Family Unrestricted Fund.

3. MICHAEL JOHNSTON HONOR FUND

This Fund was established by the Foundation to honor Michael for his service as Foundation CEO. It was funded by a few Board members and lay leaders and is owned by the Foundation. Michael said he was not aware that this fund was established when Jacob spoke with him on 11/13/19.

“Purpose: The Fund shall be used to support the Center for Innovative Philanthropy.”

“Variance power: If the CFIP **is no longer a separate department of the Foundation**, the Fund shall be used to support innovative philanthropy projects or other efforts undertaken by the Foundation to strengthen nonprofit organizations and/or provide data and research to the community, as recommended by the President and CEO.”

Next Step: The Foundation will invoke its variance power and reclassify this fund as a field of interest fund that will award grants in-line with the language above, based on the recommendations of the President and CEO.



Budget and Finance Committee

May 21, 2021

Call to order: 8:00 am Adjournment: 9:10am

Presiding: Elysa Graber-Lipperman, Chair

Recording: Rhona Morgan/Christine Kelly

Present: Elysa Graber-Lipperman, Leigh A. Newman, Alan Mendelson, Charles Ward, Gayle Temkin, Steven Kleinman, Michalee Merritt

Absent:

Also Attending: Jacob Schreiber, President/CEO; Rhona H. Morgan, Vice President Finance; Christine Kelly, Gift and Finance Controller; Susie Lotreck, VP Operations/Donor Services

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
<p>Chairman Remarks</p> <p>Meeting Minutes Acceptance and Approval</p> <p>2020/2021 Operating and Capital Budget – Quarter Review</p>	<p>The chair, Mrs. Graber-Lipperman, welcomed everyone to the meeting.</p> <p>The minutes of the February 12, 2021, meeting were presented for acceptance and approval.</p> <p>Mrs. Graber-Lipperman reviewed the quarter 3 stating that the revenues are slightly above target with actual revenue being \$1,270,102 versus budgeted revenue being \$1,257,692 which represents \$12,410 or .98% more than anticipated.</p>	<p>The minutes were accepted as presented</p>	

	<p>The Total Operating Expenses were \$1,240,234 versus budgeted expenses of \$1,292,010 which is \$51,776 or 4.01% favorable. As the notes indicate, we can generally attribute spending less than expected at the end of the third quarter due to the limitations on activities brought about by COVID-19 and timing several variances in the budget were highlighted:</p> <ol style="list-style-type: none"> 1. Personnel expenses are \$18,162 over-budget for salaries due to well-deserved board-approved bonuses provided to staff members who have forged ahead and met challenges during this difficult year. However, even with the bonuses, the total personnel expenses are only \$7,587 or .77% over budget with actual expenses being \$998,410 versus budgeted expenses of \$990,823 due to savings in other personnel expense categories. 2. General operating expenses were \$160,653 versus budgeted expenses of \$171,878 which is \$11,225 or 6.53% favorable. Occupancy costs increased by \$15,423. Jacob spoke about the Foundation's Commitment to the Community Services Building Capital Reserve Build-up, the impact on the budget and the Foundation and the Federation reaching an agreement on cost sharing. 3. Development expenses were \$43,711 versus budgeted expenses of \$88,434 reflecting a positive variance of \$44,723 or 50.57%. 4. Professional Fees were \$37,460 versus budgeted expenses of \$40,875 reflecting a positive variance of \$3,415 or 8.35%. 		
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	Overall, the Operating Surplus of \$29,868 through 3/31/21 when added to the prior years' surplus of \$309,463 results in a net operating surplus carryforward of \$339,331. The FY 2021 Operating Surplus is expected to be higher – the projection is \$43,314 which would result in a net operating surplus carryforward of \$352,777.		
	The committee recommended that we put at least \$50,000.00 towards the Aim Chai campaign expense write-off. At \$50,000.00, the net operating surplus carryforward would be \$302,777.		
PPP Loan Forgiveness	A lengthy discussion ensued on how to treat the \$233,900 received from the government. It was decided that JCF would establish the Community Grant Reserve fund to hold these funds.		
Development Plans:			
• Legacy Campaign	Mr. Schreiber spoke concerning the shift in the development efforts of the Foundation. In assessing the COVID-19 economic impact on the Jewish community, he reported that the Foundation is now expending significant efforts towards building a community-wide Life and Legacy program in partnership with the Foundation Grinspoon. The Grinspoon Life and Legacy program has been around for about 8 years and has been in about 69 communities. During that time, they've accumulated about 28,000 commitments worth over a billion dollars and about \$160 million of that has already been realized.		

<p>FY2022 Proposed Budget</p>	<p>Mr. Schreiber stated that the Development department, led by Kathryn Gonnerman, has been communicating with the 14 participating synagogues and agencies and has been experiencing great success so far.</p> <p>The proposed FY2022 budget was then discussed, and out the most significant changes between the FY2021 budget to FY2022 proposed budget were highlighted:</p> <ul style="list-style-type: none"> • Fee Revenue is projected to be almost 22% higher than FY2021's fee revenue due to an increase in the value of the Foundation's assets. • Personnel Expenses are projected to increase by \$44,242, to cover a 3% salary increase pool, increase benefit expenses, and an increase in the 403 (b) matches. • General Expenses are projected to be \$18,250 higher than budgeted FY2021. The increase is mainly driven by professional development, software/online services, technology support, equipment leases and purchases, and miscellaneous expenses. There is a significant decrease in the occupancy line of \$24,000, 28.57%. 		

	<ul style="list-style-type: none"> • Development Expenses - FY2022 budget is increased to \$163,600, which is \$55,755 or 51.70% more than the FY2021 budget. The increase is in anticipation of two special events, the production and distribution of direct mailers and monies for donor cultivation and stewardship travel. • Professional Development – there is a slight increase in the FY2022 budget of \$2,500. This is to accommodate a \$1,500 increase in Audit fees and an increase for tax preparation software. <p>The Committee recommended that the proposed budget be presented to the Board for adoption at its June 17, 2021 meeting.</p>		
		The meeting was adjourned at 9:10 am.	FY2022 Proposed Budget was subsequently presented to and adopted by the Board at the June 17, 2021, Board meeting.
Proposed Meeting Date		August 20, 2021	

Respectfully submitted by



Elysa Graber-Lipperman



**FY2021 Actual Expenses and FY2021 Approved Budget
As of June 30, 2021**

Description	Actual FY2020	Actual FY2021	Budget FY2021	\$\$ Variance	% Variance	Final Budget FY2021
REVENUES AND OPERATING SUPPORT GRANTS						
Administrative Fee Revenue @ 1.00%	876,450	894,781	872,988	21,793	2.50%	872,988
Administrative Fee Revenue @ 1.25%	416,050	419,787	414,762	5,025	1.21%	414,762
Recovery of Investment Administrative Expense	67,309	67,500	67,500	-	0.00%	67,500
Subtotal Fee revenue	1,359,809	1,382,068	1,355,250	26,818	1.98%	1,355,250
Operating Support Grants:						
General Operating Support Grant	325,000	295,000	295,000	-	0.00%	295,000
Center for Innovative Philanthropy - Operating Grant	0	0	0	-	0.00%	0
Subtotal Operating Support Grants	325,000	295,000	295,000	-	0.00%	295,000
Foundation /Fundiller-Zweig Tribute Funds Grants	18,691	19,212	19,354	(142)	-0.73%	19,354
Donations/Grants to Offset Operating Expenses	9,316	4,759	4,517	242	0.00%	4,517
Other Revenues	8,429	157	0	157	100.00%	0
Center for Innovative Philanthropy - Fee Revenue	0	0	0	-	0.00%	0
CIP Grant Writer/Outcomes Assesment Training Expenses	0	0	12,173	(12,173)	0.00%	12,173
TOTAL OPERATING REVENUES	1,721,244	1,701,196	1,686,294	14,902	0.88%	1,686,294
PERSONNEL EXPENSES						
Salaries and Other Compensation	1,047,525	1,100,924	1,070,384	30,540	2.85%	1,070,384
Health, Life, Disability Insurance	111,750	107,989	124,361	(16,372)	-13.17%	124,361
Pension - 403(b) Annuity/ Pension Admin Fees	25,646	29,668	31,118	(1,450)	-4.66%	31,118
Payroll Taxes	76,948	79,977	79,181	796	1.00%	79,181
Workers' Compensation Insurance	2,385	2,475	2,393	82	3.43%	2,393
Payroll Service Fees	1,644	1,600	2,500	(900)	-35.99%	2,500
TOTAL PERSONNEL EXPENSES	1,265,898	1,322,632	1,309,937	12,696	0.97%	1,309,937
GENERAL OPERATING EXPENSES						
Office Supplies	4,034	4,772	4,500	272	6.04%	4,500
Books and Subscriptions	1,084	3,717	1,250	2,467	197.34%	1,250
Professional Membership Fees	3,575	4,040	5,000	(960)	-19.20%	5,000
Travel/Auto	430	300	1,000	(700)	-70.02%	1,000
Postage and Shipping	3,528	2,796	3,500	(704)	-20.12%	3,500
Telephone	4,470	4,069	4,000	69	1.74%	4,000
Professional Development	16,214	6,505	12,500	(5,995)	-47.96%	12,500
Stationery and Printing	1,125	1,434	3,500	(2,066)	-59.03%	3,500
Copier Expenses	1,537	618	2,000	(1,382)	-69.10%	2,000
Insurance	12,770	14,888	14,000	888	6.34%	14,000
Equipment Leases and Purchases	3,295	6,991	5,000	1,991	39.81%	5,000

Description	Actual FY2020	Actual FY2021	Budget FY2021	\$\$ Variance	% Variance	Final Budget FY2021
Equipment Repair and General Maintenance	108	825	750	75	9.97%	750
Occupancy Costs	49,551	102,907	84,000	18,907	22.51%	84,000
Software / Online Services	46,808	49,107	49,500	(393)	-0.79%	49,500
Technology Support	9,838	15,990	12,000	3,990	33.25%	12,000
Miscellaneous	4,396	3,388	5,000	(1,612)	-32.23%	5,000
Trustee and Committee Meetings	2,897	99	4,000	(3,901)	-97.51%	4,000
Other Business Expenses	1,903	0	2,500	(2,500)	-100.00%	2,500
TOTAL GENERAL OPERATING EXPENSES	167,562	222,446	214,000	8,446	3.95%	214,000
DEVELOPMENT EXPENSES						
Yearbook	16,119	16,512	19,000	(2,488)	-13.09%	19,000
Publications and Collateral	17,049	24,956	21,000	3,956	18.84%	21,000
Special Events	18,261	0	15,000	(15,000)	-100.00%	15,000
Donor Recognition	1,440	644	1,000	(356)	-35.60%	1,000
Advertising/Promotion	9,437	4,448	21,000	(16,553)	-78.82%	21,000
Charity Fundraising Advertisements	2,904	4,659	5,500	(841)	-15.30%	5,500
Marketing Consultant / Intern	50	2,670	1,500	1,170	78.00%	1,500
Marketing Materials / Graphic Design	6,333	6,987	6,000	987	16.45%	6,000
Donor Development	10,308	8,893	10,900	(2,007)	-18.41%	10,900
CIP Grant Writer/Outcomes Assessment Training Expenses	0		12,173	(12,173)	-100.00%	12,173
Outreach Programs	0	500	4,795	(4,295)	-89.57%	4,795
Travel/Donor Cultivation	1,062	0	2,150	(2,150)	-100.00%	2,150
Jew Good Expenses	0	1,303	0	1,303	100.00%	0
TOTAL DEVELOPMENT EXPENSES	82,963	71,572	120,018	(48,446)	-40.37%	120,018
PROFESSIONAL FEES						
Legal and Filing Fees	1,241	2,170	2,500	(330)	-13.20%	2,500
Audit and Tax Return Review Fees	32,225	31,000	34,500	(3,500)	-10.14%	34,500
Consulting Fees / Personnel Recruiting Fees	31,176	9,200	5,000	4,200	84.00%	5,000
TOTAL PROFESSIONAL FEES	64,642	42,370	42,000	370	0.88%	42,000
NET OPERATING EXPENSES	1,581,065	1,659,021	1,685,955	(26,934)	-1.60%	1,685,955
CURRENT PERIOD OPERATING (DEFICIT)/SURPLUS	140,179	42,175	339	41,836		339
PRIOR YEARS' SURPLUS	219,284	309,463	309,463	0		309,463
NET OPERATING (DEFICIT)/SURPLUS	359,463	351,638	309,802	41,836		309,803
LESS: ALLOCATION TO WRITE OFF END CAMP EXP	50,000	50,000	50,000	0		
LESS: CAPITAL BUDGET	-	-	12,500	-		12,500
CIP Grant Writer/Outcomes Assessment Training Expenses	-	-	-	-		
SURPLUS/(DEFICIT) CARRYFORWARD - Operating	309,463	301,638	247,302.26	54,336		297,303
OPERATING RESERVE*	239,385	239,385	239,385	-		239,385



FY 2021 Actual Expenses Vs. Approved Operating Budget Notes (As of June 30, 2021)

2021 Approved Budget Summary Comments

Staff transitions – in marketing, development and CIP -- can make planning and budgeting difficult, but given the Foundation's fortuitous combination of strong board, committees and veteran financial staff, we feel that this year's budget will provide the necessary mix of structure and flexibility that the coming staff transitions – and a new strategic plan -- will require. Notably, the Foundation's growth, smart investment strategy and careful planning have allowed us to adjust year over year for the long-term achievement of community goals.

Revenue Outlook

This year fee revenues are projected to be essentially in line with 2021 actual fee revenue and continue to provide a solid grounding for the Foundation to achieve its mission and support the community. Administrative Fee revenue is essentially in line with last year's actual fees and is again depressed by a \$47,416 discount on administrative fees for funds or families of funds with donor assets in excess of over \$1 million. This change was implemented last year to help the Foundation adapt some of the best practices of community foundations and bring it more into alignment with its competitors.

Expense Budget

The expense budget reflects our priorities as an institution and perhaps more importantly, represents how we believe our limited resources can best be deployed to build and sustain our Jewish community. This year's budget reflects assumptions about resource deployment that include a brand refresh, and modest fluctuations in marketing and development expenses.

As with any organization of our type, human capital represents the largest proportion of our operating expense. FY2020 produced significant savings in personnel due to the elimination of two positions and delayed hire date for two replacement staff members. Total Personnel expenses are projected to increase \$14,795 to cover a 15% increase in benefit expense and an 8.5% increase in 403(b) match due to increased eligibility of four employees.

In terms of non-personnel operating costs, you'll see projected decreases in the donor recognition events – as the Board directed staff to stage a more modest dessert reception, and the substitution of a Leave a Legacy Event for the annual Donor Reception. The Foundation's commitment to quality professional development opportunities has been significantly reduced to reflect the cancellation or postponement of various on-site conferences due to continued social distancing practices required as a result of COVID-19. We will encourage our staff to utilize online conferences and continue to

network to a larger professional community to ensure that we're well-versed in the most recent philanthropic trends. The Foundation's website project was partially designed in FY2020 and will be completed in FY2021 with the budget amount of \$21,000.

In addition, as recommended by the Budget / Finance Committee, the Foundation will amortize \$50,000 of the Aim Chai Unamortized Expenses this year and revisit it each year until the entire \$663,557 is fully amortized.

Overall, the budget calls for an annual operating deficit of approximately \$43,851 that is covered by a year-end FY2020 surplus of \$368,281. The FY2021 Budget has been revised to reflect the impact 6/30/2020 actual Revenues, Expenses and Assets. Overall, the budget is now a Balanced Budget with a small surplus of \$339. Total accumulated Surplus projected through 6/30/21 is \$309,803 (i.e. Prior Surplus of \$359,463, less \$50,000 Aim Chai Amortized Expenses plus current year surplus \$339).

REVENUES

The preliminary budget assumes no change in administrative fee revenue. The administrative fee projections are based on the implementation of graduated fees for Custodial, Donor Advised and designated funds (excluding scholarship) funds or fund groups with assets exceeding \$1 million, the assessment of a 1% fee against all donor advised, designated and custodial funds and a 1.25% fee against unrestricted and scholarship funds. Administrative fees are calculated by reference to the May 25, 2020 ending fund balance. Operating Support Grant of \$295,000. Other revenues include grants to be awarded from The Foundation Fund; the Doreen Fundiller-Zweig Tribute Fund for general operations; from the Bernard Gottlieb Memorial Fund II for professional development.

AT 6-30-21, ACTUAL ADMINISTRATIVE FEES WERE 1.98% (\$26,818) ABOVE BUDGET, HOWEVER TOTAL REVENUES WERE ONLY .88% (\$14,902) ABOVE BUDGET.

EXPENSES

Salaries – The salary line is based on 10.83 FTEs. The FY2021 staff complement includes: President and Chief Executive Officer, Vice President Philanthropy, Vice President Finance, Vice President Donor Services (part-time- 30 hours), Marketing Director, Finance and Gift Controller, Vice President Programs, Development and Stewardship Officer, Grants and Donor Services Assistant, Gift and Finance Analyst, and Development Associate. Salaries for FY2021 will remain unchanged from FY2020 levels.

ACTUAL SALARY EXPENSES EXCEEDS BUDGET BY \$30,540 OR 2.85% DUE TO UNPLANNED STAFF BONUSES.

Health, Life, Disability Insurance – The budget line includes the employer's share of health and dental insurance coverage for eight employees under the Foundation's group plan (three with family coverage, three with employee plus 1 coverage, and two with single coverage). *Health and dental insurance premiums were budgeted with a 15% increase effective December 1, 2020; three current employees have coverage through their spouses or parent.*

Under the three-tiered premium payment structure introduced in 2003, the Foundation pays 80% of the premium cost for single

coverage, 76.5% for employee plus one dependent's coverage, and 74% for employee plus two or more dependents' coverage for full-time employees. The employer's share of costs is calculated by reference to a base plan.

ACTUAL BENEFITS EXPENSES SHOW A POSITIVE VARIANCE OF \$16,372 OR 13.17%. ONE FAMILY COVERAGE AND ONE EMPLOYEE +1 COVERAGE WAS REPLACED WITH TWO EMPLOYEE ONLY COVERAGES NOVEMBER 1.

Pension – 403 (b) Annuity – The pension line represents employer matching contributions for eleven staff members. The match ranges from 1% to 4% depending on years of service. The increase in this line reflects the eligibility of three new employees and increased match for one employee.

Actual Pension match expenses reflect a savings of \$1,450 at 6/30/2021.

Payroll Taxes – This line reflects payroll taxes for 10.83 employees.

ACTUAL TAXES IS 1% OR \$796 OVER BUDGET AT 6/30/2021.

Workers Compensation Insurance – This line reflects the annual premium expected to be paid to The Travelers effective July 1, 2020 plus any audit adjustment based on FY2020 actual salary data.

THIS LINE REFLECTS A SMALL OVERSPENDING OF \$82. NEW PREMIUMS WERE SLIGHTLY HIGHER THAN FY2020.

Payroll Service Fees – This line reflects biweekly payroll expenses and quarterly payroll tax filings.

ACTUAL SERVICE FEES REFLECT SAVINGS OF \$900 AT 6/30/2021.

GENERAL OPERATING EXPENSES

Office Supplies – This line reflects one year's supplies for eleven staff members.

THIS LINE REFLECTS A 6.04% OR \$272 SPENDING OVER THE BUDGET.

Books and Subscriptions – This line reflects annual and multi-year subscriptions.
This line reflects an over spending of \$2,467 due to subscription purchases not included in the budget.

Professional Membership Fees – This line includes a portion of the cost of membership in the Connecticut Council for Philanthropy, including participation in the Connecticut Community Foundations Network. Since CCP membership offers seminars and other

professional development opportunities, dues have been divided between membership fees and professional development. Also includes membership fees to the Jewish Federation National Association.

EXPENSES ARE 19.2% (\$960) UNDER BUDGET AT 6/30/2021.

Travel – The Foundation uses the IRS standard mileage rate (56.0¢ per mile effective January 1, 2021) for purposes of reimbursing authorized business travel. The budgeted amount reflects projected increased activities of the development team at full staff.

This line is 70.02% (\$700) under budget.

Postage and Shipping- Includes Postage machine lease payments and USP postage contracts.

THIS LINE REFLECTS A SAVINGS OF \$704 UNDER BUDGET AT THIS TIME.

Telephone – The Foundation's telephone service, which is part of the Community Services Building telephone system, includes a dedicated fax/postal meter line, 25% share of dial tone and direct inward dial lines and actual long distance phone usage. The Foundation shares the costs of maintaining the Community Services Building security system, Internet access through Comcast and phone system maintenance with Federation. This line also includes cell phone expense for the CEO, and a portion of cost for use of remote Internet access by two senior staff members who frequently work from home.

THIS LINE IS OVER BUDGET BY \$69 OR 1.74%.

Professional Development – Historically, this line allowed for each senior staff member to attend at least one major national, regional or local conference to enhance her/his skills as a Foundation employee. *Grants from the Bernard L. Gottlieb Memorial Fund II offset a portion of professional development costs each year.* The FY 2021 Budget to FY2020 Budget comparison reflects a reduction of about 48% due to expectation that due to the COVID-19 many onsite conferences will be cancelled or deferred until this virus is more controlled.

THIS LINE REMAINED SIGNIFICANTLY UNDER BUDGET BY \$5,995 OR 47.96% AS MANY IN-PERSON CONFERENCES REMAIN CANCELLED DUE TO COVID-19 TRAVEL AND SOCIAL DISTANCING RESTRICTIONS.

Stationary and Printing This line covers the Foundation's cost for supplies and printing for Corporate letterheads and envelopes.

THIS LINE REFLECTS A SIGNIFICANT SAVINGS OF \$2,066 OR 59.03%, AS MANY PROJECTS WERE DEFERRED AND COMMUNICATION WAS PRIMARILY ONLINE.

Copier Expense (# 70285) - \$2,000

Copier maintenance and supplies - Canon copier quarterly fix fees and variable fees based number of Black/white or color copies.

COPIER EXPENSES AT \$618 ARE \$1,382 BELOW BUDGET AS STAFF CONTINUES TO WORK FROM HOME SIGNIFICANT SAVINGS ARE BEING ACHIEVED.

Insurance – Other – This line includes premiums for directors' and officers' liability coverage (\$10 million limit with a \$25,000 deductible), employee dishonesty coverage, and small business liability insurance (with a \$5,000 deductible) and \$1 million Cyber coverage under a Foundation policy.

THIS LINE IS OVERSPENT 6/30/2021 BY 6.34% (\$888) DUE TO INCREASES IN INSURANCE PREMIUMS.

Equipment Leases and Purchases– The Foundation contracts directly with individual vendors for a color copier/fax machine, a postage meter, and a credit machine. This line reflects the contractual lease payments for a Cannon color copier/fax from Flo Tech, under a 4-year lease.

THIS LINE IS OVER BUDGET BY \$1,991 (39.81%), HOWEVER EXPENSES INCLUDE CAPITAL PURCHASES OF \$3,184 WHICH ARE COVERED UNDER THE CAPITAL BUDGET WHICH WILL BE CLOSED OUT TO THIS LINE AT 6-30-21.

Equipment Repair and Maintenance – The budget line includes an estimate for printer maintenance and parts, as well as for the needed services of a general building mechanic provided through the Community Services Building's property management company.

THIS LINE REFLECTS A SLIGHT OVERSPENDING THROUGH 6/30/2021.

Occupancy –The fixed base rent is \$8 per square foot for 4,411 square feet, which includes the Foundation office suite (2,967 square feet) and 18% of common areas (1,444 square feet) in the Community Services Building, for a total annual base rent of \$35,290. Under the lease arrangement with Federation, the Foundation will be responsible for additional rent, on a pro-rated basis, equal to the amount by which the building's operating costs exceeded \$8 per square foot. One-half of the salary of the Federation's Director of Building Operations is attributed to the maintenance of the Community Services Building and needs of all tenants. The Foundation will be required to pay an additional (\$35,000) to assist the Federation in building a Capital Reserve to cover projected CSB capital expenses.

THIS LINE REFLECTS 6 MONTHS BASE RENT AT \$2,940.84, FY2020 CATCH-UP EXPENSE OF \$14,015 AND CAPITAL RESERVE PAYMENTS OF \$53,601.92 TO JEWISH FEDERATION (JFGH) FOR CSB MAINTENANCE RESERVE.

Software/Online services – The proposed \$47,500 budget includes a 5% price increase for FIMS (Foundation Information Management System) maintenance and technical support (\$27,226 for 12 users). We signed an agreement for a 7-year Client Care

Core Package which offers 8-hour support turnaround time, upgrades, training, consultation and a 4% cap (the contract was extended 3 years and the annual fee increase cap was lowered from 7% to 4%). We also purchased a contract for Donor Central Advisors (subscription – \$10,944 and Statements \$681).

Also included are annual fees for GuideStar Charity Check, which is used for grantee due diligence review, and support for PG Calc and GiftWrap. These two products are for planned gift illustrations and proposals and planned gift administration. The license and cloud storage fee for MozyPro online backup, and annual renewal fees for spam and anti-virus protection are also included in this line.

THIS LINE IS ESSENTIALLY ON TARGET WITH A SMALL SAVINGS OF \$393 AT THIS TIME.

Technology Support – This line includes computer and network support services from Ted Naylor and Crystal Reports report optimization services from an independent consultant. This line has been increased to cover increased need for Technology support.

THIS LINE CONTINUES TO BE SIGNIFICANTLY OVER BUDGET AT \$3,990 OR 33.25% DUE TO SOFTWARE UPGRADES AND NEW HARDWARE SET UP AND CONFIGURATION.

DEVELOPMENT EXPENSES

Yearbook Expenses – We expect that the design fee and printing cost will be about the same as the FY2020 budget expenses.

THIS LINE REFLECTS SIGNIFICANT SAVINGS OF \$2,488 OR 13.09% ON THE DESIGN AND PRODUCTION OF THE YEARBOOK.

Special Events – This line includes the costs of the annual Florida trip shared with JFGH, the annual donor reception and special meetings coordinated by CIP.

THIS LINE IS REFLECTS NO EXPENSES AT THIS TIME AS THE ANNUAL DONOR RECEPTION HAS BEEN DEFERRED DUE TO COVID-19

Advertising and Promotion – This line is projected at \$21,000 and includes print advertisements, and radio spots. This line item represents the Foundation's advertising and promotion budget projected for FY2021 – Bushnell & Hartford Symphony Orchestra, Hartford Stage, Hartford Business Journal, Other Miscellaneous Media, Playhouse Theater Group and Constant Contact– E-newsletter. Due to significant underspending in FY2020 as a result of the impact of COVID-19, this line item has been reduced from \$36,000 to \$21,000.

THIS LINE IS SIGNIFICANTLY UNDERSPENT AT THIS TIME AS PROJECTS AND ACTIVITIES HAVE BEEN DEFERRED DUE TO COVID-19.

Charity Fundraising Advertisements – This line is projected at \$5,500 and includes ads placed in 501(C) 3 organizations' Fundraising materials.

THIS LINE IS 15.3% (\$841) UNDER BUDGET AT 6/30/2021.

Publications and Collateral - This is projected at \$21,000 and includes remaining costs of the Website redesign, lobby signage, Prospect packets and/ or videos, prospect videos/ Voices of Philanthropy, Legacy and Other designs and 50% of the costs of color printing supplies.

WEBSITE REDESIGN CONTINUES, HOWEVER THIS LINE TO BE SIGNIFICANTLY OVER BUDGET BY 18.84% (\$3,956).

Marketing Consultant – \$1,500 budgeted for this line for FY2021.

DUE TO INCREASED ACTIVITIES IN THE LAST FEW MONTHS MADE THIS LINE SIGNIFICANTLY OVER BUDGET AT 6/30/2021.

Donor Recognition – \$1,000 budgeted for this line to cover the costs of production and distribution of direct mailers – Hanukah and Mother's Day cards, New Year's Cards, general development printing and postage costs and color printer maintenance and supplies.

THIS LINE IS REFLECTING A SAVINGS AT THIS TIME.

Marketing Materials /Graphic Design – \$6,000 budgeted for this line to cover the costs design, printing and mailing of Community mailings, Lillian Fund mailings, Professional Advisors mailing and Rosh Hashanah cards.

AS OF 6/30/2021, THIS LINES IS 16.45% OR \$987 OVER BUDGET.

Donor Development – \$10,900 budgeted for this line to cover This line item reflects the Tumble Brook social membership dues and entertainment expenses for CEO, Florida visits and CT Parlor meetings.

AS OF 6/30/2021, THIS LINE IS \$2,007 UNDER BUDGET.

Outreach Programs –\$4,795 - This line includes meetings with donors and professional advisors, Israel Fund Education sessions, Leave a Legacy Brunch, CT parlor meetings and a series on family philanthropy events.

AS OF 6/30/2021, TOTAL EXPENSES IN THIS LINE IS \$500, LEAVING IT 89.57 % UNDER BUDGET DUE TO LIMITED PHYSICAL OUTREACH ACTIVITIES.

Travel/ Donor Cultivation –\$2,150 - This line includes Florida Trip Travel accommodation and entertainment to visit Florida Donors and local donor cultivation and stewardship travel.

NO ACTIVITIES IN THIS LINE AT THIS TIME DUE TO CONTINUING COVID-19 ENVIRONMENT

PROFESSIONAL FEES

Legal and Filing- \$2,500 includes various Secretary of State filing fees and an amount for the services of an attorney in the event one is needed.

As of 6/30/2021, WE SPENT \$2,170 LEAVING A SAVING \$330.

Accounting –\$34,500 This line reflects the cost of engaging J.H. Cohn, LLP for the fiscal 2019 audit and a topside review of the Form 990. Staff will continue prepare the IRS Form 990 (information return), Form 990T and CT990T for Unrelated Business Income Tax (UBIT). The remaining items include 990 filing and planned gift tax return preparation fees.

THIS LINE REFLECTS A SAVINGS OF 10.14% AT 6/30/2021.

Consulting and Personnel Recruiting Fees - \$5,000 – Projected use of outside Consultants.

THIS LINE IS \$4,200 OR 84% OVER BUDGET THROUGH 6/30/2021.

CAPITAL BUDGET NOTES -\$12,500

Technology continues to be critical to the effective and successful operation of the Jewish Community Foundation. This line item remains unchanged until technology strategy is finalized.

Operating Reserve

The Operating reserve remains at \$239,385 of Community Unrestricted funds which has been set aside.



Quarterly Revenue and Expense Summary
July 1, 2020 through June 30, 2021

Description	Quarter Ending September 30, 2020		Quarter Ending December 31, 2020		Quarter Ending March 31, 2021		Quarter Ending June 30, 2021		FYTD June 30, 2021		12 Months to Date June 30, 2021	
	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget	Actual	Budget
Revenue	413,634	412,563	430,580	427,565	425,888	417,564	431,094	416,429	1,701,196	1,674,121	1,701,196	1,674,121
Expenses	387,483	440,335	397,784	426,442	454,968	425,233	418,787	393,945	1,659,021	1,685,955	1,659,021	1,685,955
Operating (Deficit)/Surplus	26,152	(27,773)	32,796	1,124	(29,080)	(7,669)	12,307	22,484	42,175	(11,834)	42,175	(11,834)

Balance Sheet Related Key Statistics
July 1, 2020 through June 30, 2021

Description	9/30/20	12/31/20	3/31/21	6/30/21	FYTD 7/1/2020 - 6/30/2021	12 Months 7/1/20- 6/30/2021
Cash & Cash Equivalents	9,302,312	7,247,892	8,058,168	6,676,983		
Total Pooled Asset Balance	131,336,229	148,564,855	157,485,543	168,391,712		
Realized Cap Gains (Losses)	1,456,005	2,835,262	1,456,005	1,777,083	7,524,355	7,524,355
Unrealized Cap Gains (Losses)	5,500,272	13,423,755	5,500,272	10,510,345	34,934,644	34,934,644
Contributions	1,094,817	2,169,271	1,865,934	1,473,268	6,603,290	6,603,290
Grants and Distributions	(2,879,611)	(1,072,403)	(1,342,108)	(1,193,564)	(6,487,686)	(6,487,686)
Operating Expenses (Excl Campaign Expenses)	(387,483)	(397,783)	(454,968)	(418,787)	(1,659,021)	(1,659,021)
Endowment Campaign Expenses						
Center for Innovative Philanthropy						
Budget Items:						
Administrative Fee Revenue ¹	322,956	324,931	330,998	335,683	1,314,568	1,314,568
Donations & Grants to Offset Operating Expenses	-	15,000	4,212	4,759	23,971	23,971
Recovery of Investment Admin Expense ²	16,875	16,875	16,875	16,875	67,500	67,500
Operating Expense Subsidy	73,750	73,750	73,750	73,750	295,000	295,000
Other Revenues	53	24	53	26	157	157
Total Revenue Items	413,634	430,580	425,888	431,093	1,701,196	1,701,196
Operating Expenses (incl. JMAP & Outcomes Measr)	(387,483)	(397,783)	(454,968)	(418,787)	(1,659,021)	(1,659,021)
Current Year's Surplus/Deficit	26,152	32,796	(29,080)	12,306	42,175	42,175
Prior Periods' Surplus	309,463	335,615	368,411	339,331	309,463	309,463
Cumulative Surplus	335,615	368,411	339,331	351,638	351,638	351,638
Less Capital Budget (net of donations and grants)						
Less: Allocation To Write Off Endowment Camp Exp	-	-	-	(50,000)	(50,000)	(50,000)
Cumulative Surplus Carried Forward	335,615	368,411	339,331	301,638	301,638	301,638
Operating Reserve Balance	239,385	239,385	239,385	239,385	239,385	239,385

¹ Fees are assessed at 100 basis points for donor advised, designated funds, and synagogue custodial funds. Administrative fees are assessed at 125 basis points for unrestricted community and scholarship funds.

² Investment administration expense is based on the actual time Foundation staff devotes to investment administration management services that would otherwise be provided by third party vendors and includes 12% of Vice President Finance; 5% of President and CEO; 20% Gift and Finance Manager and 20% Senior Finance Associate.



Consolidated Balance Sheet at June 30, 2021

GAAP

ASSETS

Cash and Investments	168,469,541
Rapid Response Fund	302,592
Life Insurance (cash surrender value)	201,040
Brilliant Light Power Shares	1
Pledge Receivables	507,032
Pledge Receivables Discount	(23,973)
Other Receivables	4,568

TOTAL ASSETS

169,460,801

LIABILITIES AND FUND BALANCES

LIABILITIES

Deferred Gifts	358,357
Grants Payable	764,168
Other Payables	47,031

TOTAL LIABILITIES

1,169,556

FUND BALANCES

Unrestricted Funds	38,417,746
Donor Advised Funds	47,886,575
Designated Funds	54,234,247
Custodial Funds	27,752,676
JCF Holdings A, LLC	1

TOTAL FUND BALANCES

168,291,245

TOTAL LIABILITIES AND FUND BALANCES

169,460,801

**Statement of Revenue and Expenses and Changes in Fund Balances
for the Twelve Months Ended June 30, 2021**

	<u>Unrestricted</u>	<u>Donor Advised</u>	<u>Designated</u>	<u>Total</u>	<u>Custodial</u>	<u>JCF Holdings A, LLC</u>	<u>Consolidated Total</u>
<u>BEGINNING FUND BALANCE</u>	28,880,187	35,454,339	41,447,222	105,781,747	19,806,772	1	125,588,520
<u>REVENUES, GAINS AND OTHER SUPPORT</u>							
Gifts	458,735	2,731,596	1,029,319	4,219,651	2,117,970	-	6,337,620
Bequests	11,250	-	260,086	271,336	-	-	271,336
Campaign Gifts	1,600	-	(6,816)	(5,216)	-	-	(5,216)
Campaign Gifts - Transformational	-	-	-	-	-	-	-
Center for Innovative Philanthropy	-	-	-	-	-	-	-
Other Receipts	618,360	(574)	126,684	744,471	-	-	744,471
Net Investment Income	244,025	295,834	333,370	873,229	168,944	-	1,042,173
Realized Gains (Losses)	1,762,480	2,149,811	2,388,429	6,300,720	1,223,635	-	7,524,355
Unrealized Gains (losses)	8,162,674	9,922,702	11,174,161	29,259,537	5,675,107	-	34,934,644
Change in Deferred Gift Liability	-	-	-	-	-	-	-
Total Revenues, Gains and Other Support	11,259,124	15,099,369	15,305,233	41,663,727	9,185,655	-	50,849,382
<u>GRANTS, DISTRIBUTIONS AND EXPENSES</u>							
Grants	(1,039,027)	(2,318,085)	(2,021,664)	(5,378,776)	-	-	(5,378,776)
Grant Cancellations	42,822	1,000	44,290	88,111	-	-	88,111
Agency/Custodial Distributions	-	-	(1,500)	(1,500)	(832,314)	-	(833,814)
Campaign Distributions - Transformational	-	-	-	-	-	-	-
Other Distributions	(5,200)	(3,000)	(138,257)	(146,457)	(216,750)	-	(363,207)
Operating Expenses	(720,510)	(344,297)	(403,526)	(1,468,333)	(190,688)	-	(1,659,021)
Endowment Campaign Expenses	-	-	-	-	-	-	-
Pledge Recievable by Debt Allowance	-	-	-	-	-	-	-
Gifts/Grants offset Campaign Expenses	-	-	-	-	-	-	-
Gifts/Grants offset Ctr Innov Philanthropy Exp	-	-	-	-	-	-	-
Depreciation	-	-	-	-	-	-	-
Total Grants, Distributions and Expenses	(1,721,915)	(2,664,382)	(2,520,657)	(6,906,955)	(1,239,752)	-	(8,146,706)
Interfund Transfers	351	(2,750)	2,399	-	-	-	-
<u>ENDING FUND BALANCES</u>	38,417,746	47,886,575	54,234,197	140,538,519	27,752,676	1	168,291,195

**FY2021 Actual Expenses and FY2022 Approved Budget
As of June 30, 2021**

Description	Actual FY2020	Actual FY2021	Budget FY2021	\$ Variance	% Variance	Approved Budget FY2022	Updated Approved Budget FY2022	FY21 Budget Versus FY22 Appr. Budget \$ Variance	FY21 Budget Versus FY22 Appr. Budget %Variance	Change in Approved Budget FY2022
REVENUES & OPERATING SUPPORT GRANTS										
Administrative Fee Revenue @ 1.00%	876,450	894,781	872,988	21,793	2.50%	1,074,469	1,162,059	201,481	23.08%	87,590
Administrative Fee Revenue @ 1.25%	416,050	419,787	414,762	5,025	1.21%	508,223	528,909	93,461	22.53%	20,686
Recovery of Investment Administrative Expense	67,309	67,500	67,500	0	0.00%	68,850	68,850	1,350	2.00%	-
Subtotal Fee revenue	1,359,809	1,382,068	1,355,250	26,818	1.98%	1,651,542	1,759,818	296,292	21.86%	108,276
Operating Support Grants:										
General Operating Support Grant	325,000	295,000	295,000	0	0.00%	185,000	135,000	(110,000)	-37.29%	(50,000)
Capital Reserve Grant for JFS and JHS						12,600	12,600	12,600		-
Subtotal Operating Support Grants	325,000	295,000	295,000	0	0.00%	197,600	147,600	(97,400)	-33.02%	(50,000)
Foundation /Fundiller-Zweig Tribute Funds Grants	18,691	19,212	19,354	(142)	-0.73%	20,000	20,000	646	3.34%	-
Donations/Grants to Offset Operating Expenses	9,316	4,759	4,517	242	5.36%	4,600	4,600	83	1.84%	-
Other Revenues	8,429	157	0	157	0.00%	5,000	5,000	5,000	0.00%	-
TOTAL OPERATING REVENUES	1,721,244	1,701,196	1,674,121	27,075	0	1,878,742	1,937,018	204,621	(0)	58,276
PERSONNEL EXPENSES										
Salaries and Other Compensation	1,047,525	1,100,924	1,070,384	30,540	2.85%	1,102,496	1,102,496	32,112	3.00%	-
Health, Life, Disability Insurance	111,750	107,989	124,361	(16,372)	-13.17%	128,877	128,877	4,516	3.63%	-
Pension - 403(b) Annuity/ Pension Admin Fees	25,646	29,668	31,118	(1,450)	-4.66%	35,377	35,377	4,259	13.69%	-
Payroll Taxes	76,948	79,977	79,181	796	1.00%	82,414	82,414	3,233	4.08%	-
Workers' Compensation Insurance	2,385	2,475	2,393	82	3.43%	2,515	2,515	123	5.12%	-
Payroll Service Fees	1,644	1,600	2,500	(900)	-35.99%	2,500	2,500	-	0.00%	-
TOTAL PERSONNEL EXPENSES	1,265,898	1,322,632	1,309,937	12,696	0.97%	1,354,179	1,354,179	44,243	3.38%	-
GENERAL OPERATING EXPENSES										
Office Supplies	4,034	4,772	4,500	272	6.04%	4,500	4,500	-	0.00%	-
Books and Subscriptions	1,084	3,717	1,250	2,467	197.34%	2,500	2,500	1,250	100.00%	-
Professional Membership Fees	3,575	4,040	5,000	(960)	-19.20%	5,000	5,000	-	0.00%	-
Travel/Auto	430	300	1,000	(700)	-70.02%	1,000	1,000	-	0.00%	-
Postage and Shipping	3,528	2,796	3,500	(704)	-20.12%	3,000	3,000	(500)	-14.29%	-
Telephone	4,365	4,069	4,000	69	1.74%	4,000	4,000	-	0.00%	-
Professional Development	16,214	6,505	12,500	(5,995)	-47.96%	15,500	15,500	3,000	24.00%	-
Stationery and Printing	1,125	1,434	3,500	(2,066)	-59.03%	3,500	3,500	-	0.00%	-
Copier Expenses	1,537	618	2,000	(1,382)	-69.10%	2,000	2,000	-	0.00%	-
Insurance	12,770	14,888	14,000	888	6.34%	14,000	14,000	-	0.00%	-
Equipment Leases and Purchases	3,295	6,991	5,000	1,991	39.81%	8,000	8,000	3,000	60.00%	-
Equipment Repair and General Maintenance	108	825	750	75	9.97%	1,750	1,750	1,000	133.33%	-

Description						Approved	Updated	FY21 Budget	FY21 Budget	Change in
	Actual	Actual	Budget	\$	%	Budget	Approved	Versus FY22	Versus FY22	Approved
	FY2020	FY2021	FY2021	Variance	Variance	FY2022	Budget F2022	Appr. Budget \$ Variance	Appr. Budget %Variance	Budget F2022
Occupancy Costs	49,551	102,907	84,000	18,907	22.51%	60,000	60,000	(24,000)	-28.57%	-
Software / Online Services	46,808	49,107	49,500	(393)	-0.79%	75,000	75,000	25,500	51.52%	-
Technology Support	9,838	15,990	12,000	3,990	33.25%	16,000	16,000	4,000	33.33%	-
Miscellaneous	6,861	3,388	5,000	(1,612)	-32.23%	10,000	10,000	5,000	100.00%	-
Trustee and Committee Meetings	1,630	99	4,000	(3,901)	-97.51%	4,000	4,000	-	0.00%	-
Other Business Expenses	810	0	2,500	(2,500)	-100.00%	2,500	2,500	-	0.00%	-
TOTAL GENERAL OPERATING EXPENSES	167,562	222,446	214,000	8,446	3.95%	232,250	232,250	18,250	8.53%	-
DEVELOPMENT EXPENSES										
Yearbook	16,119	16,512	19,000	(2,488)	-13.09%	19,000	19,000	-	0.00%	-
Publications and Collateral	17,049	24,956	21,000	3,956	18.84%	31,000	31,000	10,000	47.62%	-
Special Events	18,261	-	15,000	(15,000)	-100.00%	36,000	36,000	21,000	140.00%	-
Donor Recognition	1,440	644	1,000	(356)	-35.60%	16,000	16,000	15,000	1500.00%	-
Advertising/Promotion	9,437	4,448	21,000	(16,553)	-78.82%	10,500	10,500	(10,500)	-50.00%	-
Charity Fundraising Advertisements	2,904	4,659	5,500	(841)	-15.30%	5,500	5,500	-	0.00%	-
Marketing Consultant / Intern	50	2,670	1,500	1,170	78.00%	9,000	9,000	7,500	500.00%	-
Marketing Materials / Graphic Design	6,333	6,987	6,000	987	16.45%	6,000	6,000	-	0.00%	-
Donor Development	10,308	8,893	10,900	(2,007)	-18.41%	6,900	6,900	(4,000)	-36.70%	-
Outreach Programs	0	500	4,795	(4,295)	-89.57%	6,500	6,500	1,705	35.56%	-
Travel/Donor Cultivation	1,062	0	2,150	(2,150)	-100.00%	17,200	17,200	15,050	700.00%	-
JewGood Development Expenses	0	1,303	0	1,303	0.00%	-	-	-	-	-
TOTAL DEVELOPMENT EXPENSES	82,963	71,572	107,845	(36,273)	-33.63%	163,600	163,600	55,755	51.70%	-
PROFESSIONAL FEES										
Legal and Filing Fees	1,241	2,170	2,500	(330)	-13.19%	2,500	2,500	-	0.00%	-
Audit and Tax Return Review Fees	32,225	31,000	34,500	(3,500)	-10.14%	37,000	37,000	2,500	7.25%	-
Consulting Fees / Personnel Recruiting Fees	31,176	9,200	5,000	4,200	84.00%	5,000	5,000	-	0.00%	-
TOTAL PROFESSIONAL FEES	64,642	42,370	42,000	370	0.88%	44,500	44,500	2,500	5.95%	-
NET OPERATING EXPENSES	1,581,065	1,659,021	1,673,782	(14,761)	-0.88%	1,794,529	1,794,529	120,748	7.21%	-
CURRENT PERIOD OPERATING (DEFICIT)/SURPLUS	140,179	42,175	339	41,836		84,213	142,489	83,873		58,276
PRIOR YEARS' SURPLUS	219,284	309,463	309,463	0		301,638	301,638	(7,825)	-2.53%	-
NET OPERATING (DEFICIT)/SURPLUS	359,463	351,638	309,803	41,836		385,851	444,127	76,048	24.55%	58,276
LESS: ALLOCATION TO WRITE OFF END CAMP EX	50,000	50,000	50,000	50,000		50,000	100,000	-		50,000
LESS: CAPITAL BUDGET	0	0	12,500	(12,500)		12,500	12,500	-		-
SURPLUS/(DEFICIT) CARRYFORWARD - Operating	309,463	301,638	247,303	54,336		323,351	331,627	76,048	30.75%	8,276
OPERATING RESERVE*	239,385	239,385	239,385	0		239,385	239,385	-		-



FY2022 Approved Operating Expense Budget Notes (As of June 30, 2021)

2022 Proposed Budget Summary Comments

FY2021 was one of the most unusual years of our lifetimes, as we navigated through so many uncertainties, due to the Covid-19 pandemic. The economy got hit hard, and tens of millions of Americans lost their jobs. The Foundation and Federation raised close to \$1 million and granted a total of nearly \$900,000 so far, through the Jewish Hartford Rapid Relief and Recovery Fund, to our local synagogues and Jewish agencies to help alleviate their financial hardships.

Most important, the Federal government stepped in with trillions of dollars in financial support, including the Paycheck Protection Program (PPP), which provided an infusion of cash through loans/grants to qualifying businesses and non-profits. All community partners who applied received a PPP loan/grant (some received two), which bolstered their abilities to make it through this fiscal year. The Foundation also received a PPP loan amid concern over severe market volatility and projections that endowment fund development would suffer greatly, as donors were likely to fund urgent needs caused by the pandemic. As it turns out, the market surged this year, resulting in a \$43.3 million increase in our assets to \$168.5 million, while our fund development, as of 6/30/21, decreased \$.8 million under last year.

In April, the Foundation launched the Harold Grinspoon Foundation's Life and Legacy program, a 4-year community-wide initiative to raise endowment funds primarily through after lifetime commitments. Fourteen synagogues and agencies are participating in this program, which provides trainings, materials, incentive grants and consultation, coordinated through the Foundation. This, and other initiatives, such as peer-to-peer donor education and engagement series and a review of eligibility requirements for our Community Grants Program, are based on the recommendations of our 2000-2022 Strategic Plan. Further, planning is getting underway to celebrate our 50th Anniversary in 2022.

All this good work requires additional funding for (pent up demand for) new promotional materials, in-person events, fund development activities, professional development, migration to a new data base/CRM, and more. The good news is the growth in our Administrative fees will pay for these investments, permitting us to take significantly less from our unrestricted funds to help fund operations. Important, we have a great (and happy) staff and Board, who partnered closely, demonstrated great judiciousness and flexibility throughout the pandemic - and are well-positioned to continue fueling our upward trajectory.

Revenue Outlook

This year fee revenues are projected at a 28.63% increase over FY2021 actual fee revenue and continues to provide a solid grounding for the Foundation to achieve its mission and support the community. Administrative Fee revenue is significantly increased due to the robust market performance since the beginning of the year in spite of providing \$94,585 in “discounts” on administrative fees for funds or families of funds with donor assets in excess of over \$1 million. This tiered fee structure was implemented in FY2019 to help the Foundation adopt some of the best practices of community foundations and bring it more into alignment with its competitors.

Expense Budget

The expense budget reflects our priorities as an institution and perhaps more importantly, represents how we believe our limited resources can best be deployed to build and sustain our Jewish community. As with any organization of our type, human capital represents the largest proportion of our operating expense. FY2021 will result in overspending of 1% in personnel, due primarily to the payment of Board sanctioned, mid-year bonuses to the staff. Total personnel expenses for FY2022 are projected to increase \$44,243 to cover a 3% salary increase pool, a 15% increase in benefit expense (mostly due to health insurance premium increases) and a 19.24% increase in 403(b) match due to increased eligibility of two employees.

In terms of non-personnel operating costs, you’ll see significant increases in Development (and Marketing) expenses, as we shift into high gear on new initiatives, mentioned above, which must be supported by new collateral materials (which we haven’t invested in for years), events (a donor reception *and* a Life and Legacy event), programs and assorted fund development activities. There will be a leveling off in our Occupancy line, as we had to play catch-up in FY2021, regarding paying our share of the CSB Capital Reserve Fund. In FY2022, the Foundation will begin paying its proportional share, plus the half of the proportional shares of JFS and JHS, into the Capital Reserve Fund, under a new, 5-year Board-approved agreement with Federation. The agreement has Federation paying 59.5% of the Capital Reserve Budget, reflecting their proportional share of their CSB occupancy, plus half of the proportional occupancy shares of JSF and JHS. Our total proportional share is 40.5%, which will be paid via our operational budget and through grants.

The Foundation’s investment in quality professional development opportunities remains resolute – and will return to pre-pandemic budget levels, as we expect the resumption of in-person conferences. We expect higher costs for IT and software, as we expect to migrate to a new data base/CRM, which will require updates to our IT infrastructure to support new systems. Also of note is the Foundation received confirmation that its \$233,900 PPP Loan has been turned into a grant; we will remove the liability from our Balance Sheet and record the grant as Other Receipts through our Statement of Revenue, Expenses and Changes in Fund Balances. All that money will effectively go into our unrestricted grants pool and be used to fund the newly establishes Community Emergency Grants Reserve.

Overall, the budget calls for an annual operating surplus of approximately \$92,489, even after \$160,000 was used to reduce the Operating grant from the FY2021 level of \$295,000 down to \$135,000. The FY2021 operating surplus is \$42,175 and when added to the prior years’ surplus results in a net surplus carried forward of \$309,463 less \$50,000 Aim Chai campaign expense write-off and will result in a projected cumulative surplus of \$301,638 at 6-30-2021. In addition, the Budget Finance Committee is recommending an additional \$100,000 write-off of the Aim Chai expenses in FY2022 resulting in a projected net surplus carryforward of \$331,627 at 6/30/2022.

REVENUES

The updated budget projects a significant increase in administrative fee revenue driven by over 34.6% increase in assets from June 30, 2020 and are based on the implementation of graduated fees for Custodial, Donor Advised and designated funds (excluding scholarship) or fund groups with assets exceeding \$1 million, the assessment of a 1% fee against all donor advised, designated and custodial funds with assets less than \$1 million and a 1.25% fee against unrestricted and scholarship funds. Administrative fees are calculated by reference to the June 30, 2021 ending fund balance. Revenues also include Operating Support Grant of \$185,000 and Capital Reserve grant of \$12,600 for JFS and JHS, grants to be awarded from The Foundation Fund, the Doreen Fundiller-Zweig Tribute Fund for general operations, and from the Bernard Gottlieb Memorial Fund II for professional development.

PERSONNEL EXPENSES

Salaries – The salary line is based on 10.83 FTEs. The FY2022 staff complement includes: President and Chief Executive Officer, Vice President Philanthropy, Vice President Finance, Vice President Donor Services (part-time- 30 hours), Marketing Director, Finance and Gift Controller, Vice President Programs, Development and Stewardship Officer, Grants and Donor Services Assistant, Gift and Finance Analyst, and Development Associate. A Salary Pool of 3% of total salaries (\$32,112 + benefit and taxes of \$3,741) has been included in the compensation budget.

Health, Life, Disability Insurance – The budget line includes the employer's share of health and dental insurance coverage for eight employees under the Foundation's group plan (three with family coverage, two with employee plus 1 coverage, and three with single coverage). *Health and dental insurance premiums were budgeted with a 15% increase effective December 1, 2021; three current employees have coverage through their spouses or parent.*

Under the three-tiered premium payment structure introduced in 2003, the Foundation pays 80% of the premium cost for single coverage, 76.5% for employee plus one dependent's coverage, and 74% for employee plus two or more dependents' coverage for full-time employees. The employer's share of costs is calculated by reference to a base plan.

Pension – 403 (b) Annuity – The pension line represents employer matching contributions for eleven staff members. The match ranges from 1% to 4% depending on years of service. The increase in this line reflects the and increased match for two employees.

Payroll Taxes – This line reflects payroll taxes for 10.83 employees.

Workers Compensation Insurance – This line reflects the annual premium expected to be paid to The Travelers effective July 1, 2021 plus any audit adjustment based on FY2021 actual salary data.

Payroll Service Fees – This line reflects biweekly payroll expenses and quarterly payroll tax filings.

GENERAL OPERATING EXPENSES

Office Supplies – This line reflects one year's supplies for eleven staff members.

Books and Subscriptions – This line reflects annual and multi-year subscriptions.

Professional Membership Fees – This line includes a portion of the cost of membership in the Connecticut Council for Philanthropy, including participation in the Connecticut Community Foundations Network. Since CCP membership offers seminars and other professional development opportunities, dues have been divided between membership fees and professional development.

Travel – The Foundation uses the IRS standard mileage rate (56.0¢ per mile effective January 1, 2021) for purposes of reimbursing authorized business travel. The budgeted amount reflects projected increased activities of the development team at full staff.

Postage and Shipping – Includes Postage machine lease payments and USP postage contracts.

Telephone – The Foundation's telephone service, which is part of the Community Services Building telephone system, includes a dedicated fax/postal meter line, 25% share of dial tone and direct inward dial lines and actual long distance phone usage. The Foundation shares the costs of maintaining the Community Services Building security system, Internet access through Comcast and phone system maintenance with Federation. This line also includes cell phone expense for the CEO, and a portion of cost for use of remote Internet access by two senior staff members who frequently work from home.

Professional Development – Historically, this line allowed for each senior staff member to attend at least one major national, regional or local conference to enhance her/his skills as a Foundation employee. *Grants from the Bernard L. Gottlieb Memorial Fund II offset a portion of professional development costs each year.* The FY 2022 Budget to FY2021 Budget comparison reflects an increase of 24% due to expectation that due as the COVID-19 virus becomes more controlled we expect that many onsite conferences will be rescheduled. This budget is still significantly below our pre-COVID-19 budgets for this line.

Insurance – Other – This line includes premiums for directors' and officers' liability coverage (\$10 million limit with a \$25,000 deductible), employee dishonesty coverage, and small business liability insurance (with a \$5,000 deductible) and \$1 million Cyber coverage under a Foundation policy.

Equipment Leases – The Foundation contracts directly with individual vendors for a color copier/fax machine, a postage meter, and a credit machine. This line reflects the contractual lease payments for a Cannon color copier/fax from Flo Tech, under a 4-year lease.

Equipment Repair and Maintenance – The budget line includes an estimate for printer maintenance and parts, as well as for the needed services of a general building mechanic provided through the Community Services Building's property management company.

Occupancy – The fixed base rent is \$8 per square foot for 4,411 square feet, which includes the Foundation office suite (2,967 square feet) and 18% of common areas (1,444 square feet) in the Community Services Building, for a total annual base rent of \$35,290. Under the lease arrangement with Federation, the Foundation will be responsible for additional rent, on a pro-rated basis, equal to the amount by which the building's operating costs exceeded \$8 per square foot. One-half of the salary of the Federation's Director of Building Operations is attributed to the maintenance of the Community Services Building and needs of all tenants. The Foundation will be required to pay an additional (\$22,655 of which \$10,069 which represents the Foundation's share will be included in the Operating expenses and \$12,600 which represents the contributions towards JFS and JHS obligation will be covered by a grant from the community unrestricted grants pool) to assist the Federation in building a Capital Reserve to cover projected CSB capital expenses.

Software/Online services – The proposed \$75,000 *budget includes a 5% price increase for FIMS* (Foundation Information Management System) maintenance and technical support (\$27,226 for 12 users). We signed an agreement for a 7-year Client Care Core Package which offers 8-hour support turnaround time, upgrades, training, consultation and a 4% cap (the contract was extended 3 years and the annual fee increase cap was lowered from 7% to 4%). We also purchased a contract for Donor Central Advisors (subscription – \$10,944 and Statements \$681). We have also included an additional \$20,000 to cover expense which may be incurred to transition to a new operating system in the second half of the fiscal year.

Also included are annual fees for GuideStar Charity Check, which is used for grantee due diligence review, and support for PG Calc and GiftWrap. These two products are for planned gift illustrations and proposals and planned gift administration. The license and cloud storage fee for MozyPro online backup, and annual renewal fees for spam and anti-virus protection are also included in this line.

Technology Support – This line includes computer and network support services from Ted Naylor and Crystal Reports report optimization services from an independent consultant. This line has been increased to cover increased need for Technology support.

DEVELOPMENT EXPENSES

Yearbook Expenses – We expect that the design fee and printing cost will be about the same as the FY2021 budget expenses.

Special Events – This line at \$36,000 reflects a significant increase over previous years' budgets. Included is \$11,000 for the annual Donor Reception, and \$25,000 for a May 22, 2022 Legacy Event.

Advertising and Promotion – \$10,500 - This line item represents the Foundation's advertising and promotion budget projected for FY2022 – Bushnell & Hartford Symphony Orchestra, Hartford Stage, Hartford Business Journal, Other Miscellaneous Media, Playhouse Theater Group and Constant Contact– E-newsletter, e-blasts/social media/ ads/ blogs.

Charity Fundraising Advertisements – This line is projected at \$5,500 and includes advertisements placed in 501(C) 3 organizations' Fundraising materials.

Publications and Collateral - This is projected at \$31,000 and includes costs for new marketing materials (fact sheets, general brochure, pocket folder and financial marketing materials), life and legacy brochures and pullout banners. It also includes costs of lamp post banners and 50% of the costs of color printing supplies. The Foundation has not developed new collateral materials for years.

Marketing Consultant – \$9,000 budgeted for this line for FY2022 to help us integrate the development of new materials for the Foundation, Life and Legacy and begin work on the 50th Anniversary promotion.

Donor Recognition – \$16,000 budgeted for this line to cover the costs of production and distribution of direct mailers – Hanukah and Mother's Day cards, New Year's Cards, general development printing and postage costs and color printer maintenance and supplies.

Marketing Materials /Graphic Design – \$6,000 budgeted for this line to cover the costs of design, printing and mailing of Community mailings, Lillian Fund mailings, Professional Advisors' mailing and Rosh Hashanah cards.

Donor Development – \$6,900 budgeted for this line to cover the Tumble Brook social membership dues and entertainment expenses for CEO, Florida visits and CT Parlor meetings.

Outreach Programs –\$6,500 - This line includes meetings with donors and professional advisors, Israel Fund Education sessions, Leave a Legacy Brunch, CT parlor meetings and a series on family philanthropy events.

Travel/ Donor Cultivation –\$17,200 - This line includes Florida Trip Travel accommodation and entertainment to visit Florida Donors and local donor cultivation and stewardship travel plus an additional \$13,000 for the CEO's attendance in the Federation's Major Donor Mission to Israel.

PROFESSIONAL FEES

Legal and Filing- \$2,500 includes various Secretary of State filing fees and an amount for the services of an attorney in the event one is needed.

Accounting –\$37,000 This line reflects the cost of engaging J.H. Cohn, LLP for the fiscal 2021 audit and a topside review of the Form 990. Staff will continue to prepare the IRS Form 990 (information return), Form 990T and CT990T for Unrelated Business Income Tax (UBIT). The remaining items include 990 filing and planned gift tax return preparation fees.

Consulting and Personnel Recruiting Fees - \$5,000 – Projected use of outside Consultants.

CAPITAL BUDGET NOTES -\$12,500

Technology continues to be critical to the effective and successful operation of the Jewish Community Foundation. This line item remains unchanged until technology strategy is finalized.

Operating Reserve

The Operating reserve remains at \$239,385 of Community Unrestricted funds which has been set aside.



President's Report/ Q1 FY2022

August 26, 2021

PRIDE

A feeling of deep pleasure or satisfaction derived from one's own achievements
or the achievements of those with whom one is closely associated

--The Free Dictionary

At this time of year, when fall creeps up slowly on summer, we look back at our overall numbers from FY2021 and assess our progress. In doing so, I hope you share the overflowing pride I feel in our Foundation's collective achievements. Through careful planning and systematic execution, our Development Team of **Kathryn Gonnerman**, **Elana MacGilpin** and **Madison Leighty** had another banner year, **raising \$6.8 million**, while partnering with other foundations (Harold Grinspoon, Zachs Family and HFPG) to launch and coordinate two community-wide endowment campaigns – Life & Legacy and Endow Hartford 21 -- which will bolster the endowments of nearly 60 total Jewish and secular organizations.

At the same time, we began laying the groundwork for celebrating the Foundation's 50th anniversary began producing essential collateral materials (thank you **Maureen O'Connell**), started implementing our new Synagogue Grant Program (thank you **Michael Elfenbaum**), and drafted/adopted numerous policy recommendations in partnership with our lay leadership (thank you **Trustees**) that support the growing aspirations of the Foundation.

All this is made possible by the behind-the-scenes efforts of the Finance and Operations teams, who are in the midst of their busiest season and working diligently as ever to ensure our considerable annual processes are completed correctly and on-time. Without the integrity of our data, consistency of our record-keeping, and timeliness of our reporting, the Development, Marketing and Grants departments could not do their jobs. Because these processes occur each year, it may be easy to take them – and the professionalism required to manage them well – for granted. So please join us in offering special thanks to **Susie Lotreck** and **Goldy Singh**, and **Rhona Morgan** and her team of **Christine Kelly** and **GjerGji Kala** for their continued excellence in donor services and financial management that make working with the Foundation a pleasure.

All the work you will read about in this packet has been done while we continue to careen on the Covid rollercoaster. Somehow, all of us have mostly managed to juggle the unique challenges thrown at us, while remaining dedicated to our mission – and being kind to one another. As we enter the High Holiday season and reflect on our blessings and transgressions, please take a few moments to feel the pride and satisfaction you deserve for going above and beyond in making a significant difference in the lives of so many people – while securing our community's vibrant Jewish future. Together.

Following are some of the key year-end items from FY2021, and some of our activities since our last Board meeting (*for a one-page snapshot of our key metrics, please see the Management Dashboard at the end of the President's Report*):

⇒ **IMPACT/GRANTS** -- It is always difficult to compare year over year because every year is unique. This is particularly true for both FY2020 and FY2021, due to the pandemic (and so it will be difficult to compare FY2022 to FY2021 as well). That said, as of 6/30/21:

- **Donor Advised** -- As always, Donor Advised Fund (DAF) grants fluctuate because they are driven by donor timing and choice. While we don't know what would have been without the pandemic, FY2020 DAF grants are lower than in FY2021 in part because many people gave to the Covid-19 Rapid Relief and Recovery Fund (RRRF) in FY2020, which is reflected in interfund grant numbers. Factoring Interfund grants (which is how DAF advisors contributed to the RRRF) DAF grants are relatively the same year over year.
- **Designated** grants are up this year by \$345,000, mostly due to \$590,000 awarded from the RRRF.
- **Unrestricted** grant awards are \$300,000 higher in FY2021 vs. FY2020. Much of the difference is due to the Foundation's decision to suspend our normal Community Grants Program in March FY2020 in favor of reserving the funds for Covid-19 relief and recovery. We project FY2022 may see an increase in unrestricted grantmaking due to the implementation of the new Synagogue Grants Program, which the Board approved in June.

⇒ FINANCE/INVESTMENT

- The stock market continues its climb. The **6/30/21 preliminary** performance report reflects invested assets of **\$168.9 million, up from \$125.5 million** at the same time last year, reflecting a one-year return on investments of 34.5% and beating the overall benchmark by **250 basis points**.

⇒ BUDGET:

As of **6/30/21**, our budget recorded a **surplus of \$42,175** mostly driven by lower operating and development expenses, due to delayed or cancelled activities, as the Foundation continued to comply with state guidelines amid the COVID-19 pandemic. A larger surplus was partially offset by modest overspending in total personnel expenses, due to employee bonuses that were not budgeted. The **cumulative operating surplus at 6/30/2021 is \$301,638** after a \$50,000 write off of unamortized Aim Chai Endowment Campaign expenses.

Also of note is that, due to a **\$108,276 increase in administrative fees**, re-calculated on the 6/30/2021 year-end asset balance, the FY2022 **projected budget surplus increased from \$84,213 to \$192,489**.

⇒ DEVELOPMENT

- **Year-End Fundraising Outlook** -- As of 6/30/21, **total donations stood at \$6.8 million**, compared to \$7.7 million in the previous year. The difference is largely attributable to a \$3 million bequest to a custodial fund last year, resulting in a \$2.5 million decrease in custodial funds this year compared to FY2020. However, the \$2 million in custodial fund transfers to the Foundation this year is still a very robust figure. Also notable is a marked increase in **DAF contributions, which more than doubled to \$2.8 million**, likely due to a combination of systematic stewardship and excellent market returns, resulting in additional stock donations. We also achieved a slight increase in Designated Fund contributions, from \$1.2 million in FY2020 to \$1.4 million in FY2021, and experienced relative consistency in unrestricted fund donations at approximately \$500,000 per year. Importantly, FY2021 yielded a **significant increase in new funds from 20 to 52**. Twenty-two of these are for Endow Hartford 21, which were established in June, and so have not yet achieved substantial revenue. Initial gifts to start these 52 new funds accounted for a total of \$1.8 million of the Foundation's total donations this year.
- **Stewardship and Fundraising for Community Action (Unrestricted) Funds** -- Annual statements for designated and unrestricted funds will go out with additional stewardship this year. In FY2020, we featured a designated fund statement cover letter that provided an update from the organization the fund supports (e.g., if a fund for the JCC, the letter included a few paragraphs provided by the JCC). In FY2021, we continue this practice and will also add a letter highlighting our unrestricted funds with details of our year. These letters are part of an effort to ensure that every donor touch point reinforces the excellent work his/her fund is doing.

These stewardship letters fit into a larger, emerging strategy to make a stronger case for Community Action Funds (Unrestricted Funds). This strategy entails a few key elements:

- 1) Update the name of these funds from Unrestricted Funds to *Community Action Funds* (unrestricted). This change creates a stronger connection between these funds and the grants they support: the Community Grants Program.
- 2) Make a case that the Foundation cannot do all that it does without the support of unrestricted funds – including providing and coordinating community-wide endowment-building initiatives such as Life & Legacy and Endow Hartford 21.
- 3) Reconnect with long-time unrestricted fund holders and remind them of the importance of their funds' flexibility during the pandemic and beyond. This effort includes sharing specifics of Community Grants made during this year.
- 4) Ask directly and clearly for support through unrestricted funds.

After the statements are sent, Development staff and Life & Legacy team members will reach out to unrestricted fund holders to begin conversations about legacy planning. These efforts also pave the way to help achieve our objective of utilizing our 50th anniversary (2022) to increase our Community Action Funds pool.

- **Life & Legacy Update** -- As of August 16, we have **achieved 65 legacy commitments from 52 donors**. This number grows every week thanks to the diligent efforts of the Legacy Teams across our 14 community partners. To assist our community partners, we created and distributed: custom pull-up banners for them to place in their buildings or display on-site at programs, 100 copies of the full color Case Statement Booklet which highlights every organization and lapel pins and nametag stickers (courtesy of the Grinspoon Foundation), so that their legacy team members and legacy donors can better encourage others in their organizations to make a legacy commitment. These were all hand delivered in early August. **If you or anyone you know would like to talk with us about a Legacy gift this is the right time to do it!**

In addition to calling every Life & Legacy donor who signed a Letter of Intent (LOI), we will be recognizing them in a Rosh Hashanah ad in the Jewish Ledger, and are mailing local, artisan honey to them (and to all donors who opened a fund in the past two years) for Rosh Hashanah, just to say thank you. All Life & Legacy donors will be added to the Foundation Legacy Society and all will be recognized in our Annual Report. We have started the process to create a digital Book of Life, which will highlight all of our Legacy donors and a brief story of why they created a legacy with us. We are modeling our Book of Life from the Kansas City Jewish Community Foundation and will have our own microsite to launch in conjunction with the Foundation's 50th anniversary next year.

- **JewGood Hartford** -- On June 24 we had our FY2021 Grant Reveal Party at the GastroPark with 25 JewGooders. We are excited to share that COMPASS Youth Collaborative (www.compassyc.org) is our FY2021 grant recipient. They will use these funds to support their Junior Peacebuilders program that works with Hartford-based youth ages 16-21. We also held a brewery hangout this summer and are planning another hangout at the Claypen Pottery Studio. These informal gatherings help recruit JewGooders and give them the opportunity to get to know each other and learn more about our giving circle for young professionals. We are recruiting new members for our Steering Committee who will help bring JewGood Hartford into our third year.
- **The Lillian Fund's** FY2021 grant recipient is Klingberg Family Centers in New Britain (www.klingberg.org). They will use the grant to help fund their Klingberg Children's Advocacy Center for children and youth who have been abused. This is a new partnership for the Lillian Fund and we have plans to tour their center and learn more about their important services. We are excited to announce that Karen Binkhorst will be the new Chair of the Lillian

Fund. Karen has been a Lillian Fund committee member for the past three years and brings much passion to this position. We are looking forward to a robust year ahead.

⇒ **COMMUNICATIONS/MARKETING** -- The Marketing Department debuted a general brochure to educate potential donors about our mission, values, expertise, flexible giving options and the compelling reasons why you should partner with the Foundation. This multi-fold brochure will be distributed to potential donors through a tailored approach such as one-on-one conversations and donor inquiries. Marketing also created a four-color folder that will be used to send out the brochure, annual report and other marketing materials, as needed. We are working with a professional graphic design firm, Group C, to create these pieces.

- Our giving circles are in the news! We secured three news placements about JewGood Hartford and the Lillian Fund's annual grants. In addition, our Facebook post about these grants was our top-ranked post in July. Here are the links to the three news articles, which includes interviews and information about the nonprofit recipients:

THE LEDGER

<http://www.jewishledger.com/FY2021/08/jewish-community-foundation-giving-circles-announce-grants-to-local-non-profits/>

WEST HARTFORD NEWS

<http://digitalpub.chron.com/publication/?m=55882&i=716638&p=2&ver=html5>

NEW BRITAIN HERALD

<http://www.newbritainherald.com/NBH-New+Britain+News/394188/klingberg-family-centers-is-amongst-two-local-nonprofits-awarded-grants>

- The Federation and Foundation are co-sponsoring the play [Two Jews Walk into a War](#), which will run September 23 – October 8, at Playhouse on Park in West Hartford. We will use this opportunity to promote our Life & Legacy program with a full-page advertisement in the show's playbill. We have some free tickets available for the show; if you are interested, please contact our Marketing Director, Maureen O'Connell, at moconnell@jcfhartford.org.

⇒ **UPCOMING EVENTS**

- Trustee (past and present) Appreciation Event – Thursday, October 7 (*Tentative*; details TBD)
- JCF Board Meeting – Thursday, November 18, 4:30-6:30pm (place TBD)



Management Dashboard

Finance: FYTD							Impact:			
	06/30/2021	06/30/2020					Donor Advised	Designated	Unrestricted	
Revenue as a % of Budget	100.88%	98.94%					Grants FYTD as of 6/30/2021(#!/\$):	629/\$2,318,085	525/\$2,018,877	26/\$1,004,059
Expenses as % of Budget	98.40%	91.04%					Grants FYTD as of 6/30/2020 (#!/\$)	572/\$2,051,254	473/\$1,676,684	15/\$716,873
Current Operating Surplus/(Deficit)	42,175	140,179					Interfund Grants FYTD as of 6/30/2021	3/\$2,750		
Cum. Operating Surplus/(Deficit)	301,638	359,463					Interfund Grants FYTD as of 6/30/2020	49/\$355,577		
Personnel Exp. as % of Assets	0.783%	1.004%								
Investment Returns							Grants Awarded by Program Area			
	Cal. YTD	FYTD	1yr	3yr	5yr	10yr				
JCF (06/30/2021):	10.8%	35.0%	35.0%	12.3%	12.1%	8.4%				
Overall Market Benchmark (06/30/2021):	10.2%	32.5%	32.5%	11.9%	11.6%	8.4%				
	Fund Balance FYTD 06/30/2021**	Fund Balance 06/30/2020**	% Growth Prior Yr. End							
Unrestricted	38,417,146	28,876,187	33%							
Donor Advised	47,747,686	35,206,773	36%							
Designated	53,890,738	41,066,811	31%							
Custodial	27,752,616	19,806,562	40%							
JCF Holdings A, LLC	1	1	0%							
Total	\$ 167,808,187	\$ 124,956,334	34.29%							
**Fund Balances do not reflect pledge receivables										
Development/Donors.*							Communication/Awareness:			
	06/30/2021	06/30/2020					Facebook	Summer 2021	Late Spring 2021	% Change
New Funds FYTD	52	20					Total Reach	1,469	815	80%
New Custodial Funds FYTD	7	7					Email Marketing	Summer 2021	Late Spring 2021	% Change
New Custodial Funds Value FYTD	\$ 817,501	\$ 1,586,453					Average Open Rate	32%	29%	10%
Bequests/Legal Transfers Gift FYTD	4	9					Media Placements	Summer 2021	Late Spring 2021	
Bequests/Legal Transfers Value FYTD	\$ 274,147	\$ 762,997						5	0	
As % of Total Donations FYTD	4.02%	9.9%								
Total Donations FYTD*	\$ 6,825,775	\$ 7,696,796								
Unrestricted Funds	\$ 474,985	\$ 554,326								
Donor Advised Funds	\$ 2,840,272	\$ 1,357,690								
Designated Funds	\$ 1,395,177	\$ 1,190,816								
Custodial Funds	\$ 2,115,342	\$ 4,593,965								
* Reflects gifts received (including Aim Chai pledge payments) and does not reflect Interfund Gifts.										



50th Anniversary Briefing

Forward-thinking philanthropists invested in the future of our Jewish community 50 years ago by partnering with the Foundation to open funds and promise after-lifetime gifts. Thanks to these visionary donors, our community is a wonderful place for people of all ages to live rich, meaningful Jewish lives. Because of these donors, the Foundation is increasingly well-positioned to help our partner organizations meet current challenges and help guarantee they remain vital for generations to come.

Our 50th anniversary is an opportunity to raise our profile and honor past and current supporters, while expanding opportunities for people to help us ensure a vibrant, joyous Jewish community in perpetuity.

Goals

- Heighten awareness and understanding of the Foundation as *the* trusted philanthropic partner for Greater Hartford's Jewish community
- Thank and honor donors for their generosity
- Increase number of funds and after-lifetime gifts

Possible Opportunities

- **Recognition Reception for Past and Present Trustees** – TBD based on Covid-19 situation
- **Community Engagement Project** – Commission a professional artist to design a mosaic that celebrates our Jewish community's people and institutions
 - Engage hundreds of volunteers from across the community to participate in the hands-on creation of the mosaic
 - The JCF donor recognition wall in the Community Services Building will be replaced by the Mosaic and an interactive, digital, donor recognition display
- **Host 50th Anniversary Reception (fall 2022)**
 - Share our vision for our strong future
 - Create event activities; record video and take photos of activity – post online
 - Honor all JCF Board Chairs
- **Create New Funds**
 - Prioritize the success of Life and Legacy – ensure our community and the Foundation reach their goals
 - Offer a Special 2022 Donor Advised Fund product for people 50 and under
- **Create a Digital Book of Life**
 - Donors write and submit testimonials and photos that express their commitment to Jewish values and heritage, for our website
- **Marketing Campaign Approach**
 - Create emotional moments and activities that bond the community together
 - Produce a series of story-telling opportunities (events, videos, etc.) that highlight 50 years of impact and underscores the strong future of our community
 - Steward funds (specifically Community Action - Unrestricted Funds) through a highly personalized approach that inspires giving

Donor Advised Fund Taskforce Recommendations to the Board**August 26, 2021**

After careful consideration based on market research, personal experience, and meetings conducted throughout 2020-2021, the Donor Advised Fund Taskforce is recommending the following adjustments to the Donor Advised Fund parameters at the Foundation. Many thanks go to the Taskforce members, including Gayle Temkin, Gerry Goldberg, Elysa Graber-Lipperman, Bob Yass and Dave Miller, as well as staff members Jacob Schreiber, Rhona Morgan, Michael Elfenbaum and Kathryn Gonnerman.

Recommendations:

1. Maintain current \$10,000 minimum to open
2. Adjust fee structure as follows: \$100 for funds with assets up to \$9,999; 1% for all other funds (until they hit \$1mm or more, triggering our tiered fee structure)
3. Adjust the minimum ongoing balance requirement from \$10,000 to \$7,500, thereby allowing build-up funds that have recently reached \$10,000 to make a grant of a more meaningful size, if the donors choose.
4. Adjust the Successor Advisor Policy so that any Donor Advised Fund may have two generations of successor advisors, regardless of Fund Balance.
5. Implement 50th Anniversary: For donors 50 and under -- \$5,000 minimum to open a Donor Advised Fund (Limited Time Pilot). Details are outlined below.

About the 50th Anniversary 50 and under, \$5,000 Donor Advised Fund

The Taskforce's conversations have highlighted areas of uncertainty around donor behavior. One stated reason to consider adjusting minimums to open or minimum ongoing balances is to attract up-and-coming families earlier, before they establish philanthropic preferences with commercial funds or other national Jewish fund providers (such as the NYC-based Jewish Community Fund). Regardless of our extensive market research, we still ask, "Who will be interested in a fund with a lower barrier to entry? Will donors in earlier phases of their lives find our offerings satisfying? What changes will attract the donors we seek?"

One way to further understand our community's preferences and needs is with a pilot program. With the 50th anniversary coming in 2022, it could be an opportune time to offer a limited-time product to test the market.

Recommended Parameters

- 1) Target audience: Donors 50 and under
(if a family or couple, at least one donor must be under 50)
- 2) Offering: Donor advised funds with minimum to open at \$5,000 and ability to spend it down; \$100 minimum annual fee (prorated on a monthly basis).
- 3) Time frame: Fund must be opened in Calendar Year 2022; full spend-down ability would extend for two years, through the end of 2024, at which point the Foundation would re-evaluate.
- 4) Limitations: These funds are not eligible for build-up. The full \$5,000 minimum must be funded during 2022.
- 5) Additional benefits: \$180 minimum grants (rather than our \$250 standard); \$180 one-time incentive grant made from the Foundation (unrestricted pool) to the donors' organization of choice upon opening the new fund.

Success Metrics

This program is as much about customer engagement and satisfaction as it is about new funds. The metrics below are designed to help the Foundation learn as much as possible from the target audience; they are guidelines, but not targets. The program could be remarkably successful and far exceed these, or not interest our audience and fall short of these goals; still the program's goal will have been accomplished: to learn more about how to engage this target audience in the Foundation's mission.

1. Inquiries from 30 prospects from the target age group
2. Conversations with 15 prospects from the target age group
3. 5 new DAFs opened by December 31, 2022
4. Customer satisfaction of new DAF fundholders after one year, based on anecdotal information and a net promoter score.

After fundholders have been able to use their new funds for at least six months, we'll engage them in a customer satisfaction survey/conversation and reconvene the taskforce to evaluate the program.

Hartford Jewish Cemeteries Restoration Fund & Unrestricted Gifts to the Foundation

The purpose of this memo is to review the effects of a policy in place, and explore opportunities to improve or adjust it to address potential donor relations concerns.

Original Policy

In July 2018, the Foundation's Trustees engaged in a discussion of the community's long-term funding needs to support our communal cemeteries. At that meeting, the Trustees adopted a new policy: "Upon motion, duly made and seconded, the Board unanimously approved a 10% allocation of unrestricted funds coming into the Foundation to the cemetery endowments."

A letter went out to all donors at that time, informing them of the new policy and the reasons surrounding it.

Effects to Date

Since the policy was first implemented, the Hartford Jewish Cemeteries Restoration Fund added more than \$92,000 in gifts through April 2021. In the same period, no significant cemetery endowment growth has been amassed from other efforts, and the needs continue to increase.

Unintended Consequences

An unintended consequence of the policy, however, is some reluctance on the part of donors, especially when establishing a new fund. For example, if someone is choosing between a new designated fund or a new unrestricted fund, the effective minimum for their unrestricted fund is more than \$5,500 because 10% would be removed for cemeteries. This policy, therefore, disincentivizes Community Action Funds (unrestricted).

We have had one complaint as a result of the policy, where a donor objected to the policy and the use of funds for the cemetery. This issue was amended by making an exception to the 90/10 rule for that particular gift.

One might ask – if the dollars are unrestricted, why do donors care about this policy? They trust us to allocate the distributions from these funds, so why not trust us to allocate a portion to cemeteries? From our observations, it seems clear that donors take pride in the fund balances of their unrestricted funds, especially when the funds are named after family members. To see 10% removed at the time of donation feels like we are "taking away" from their family legacy.

Implications Moving Forward

Moving ahead, we see two major concerns with keeping the policy and practice exactly as is:

- 1) Impact on unrestricted legacy gifts: As we look to garner unrestricted legacy gifts, we feel that we need to inform donors of the implications of unrestricted gifts. If donors are choosing between bequeathing dollars to the Foundation or another agency, this policy may push them to select a different organization.
- 2) Impact on unrestricted funds generally: This policy is a deterrent for donors who are considering multiple options for a fund. If possible, we also would like to equalize the options.

Considerations

To address these concerns, we have considered the following options. Our final recommendation follows.

- A. **Keep & Communicate:** Keep the policy as is, and provide more clear, consistent communication about the policy – on the website, on online giving platform, in print publications.
Benefits: Ensures transparency
Drawbacks: Does not address potential reluctance from donors to make unrestricted gifts with this rider.
- B. **Adjust Operations & Maintain Essence of the Policy:** Keep the 90/10 rule, but remove the funds annually from the pool of unrestricted grant dollars. This will be administered on the back end, when we sweep the unrestricted funds available for the annual budgeting process; we would take 10% of the total new unrestricted gifts from the year and transfer it to the Hartford Jewish Cemeteries Fund, to be capped at \$50,000 annually. So, for example, if we received \$100,000 in unrestricted dollars one year, we would allocate \$10,000 from our unrestricted grants pool into the Hartford Jewish Cemeteries Restoration Fund to build up its endowment over time.
Benefits: donors would not “lose” revenue from individual funds.
Drawbacks: In cases of extremely large revenues for unrestricted funds, the dollars removed could significantly reduce the overall pool of grant dollars available for community grants. *To address this concern, we could cap the overall allocation at \$50,000 annually.*
- C. **Ask Donors on a Gift-by-Gift Basis:** Make the policy optional for unrestricted donors, and only employ the 90/10 policy for unrestricted legacy gifts where living relatives are not available for consultation.
Benefits: This approach is the most donor-centric, allowing donors to make the call on each gift.
Drawbacks: The additional consultation may be unwieldy or impractical for Foundation staff, or yield limited results.
- D. **Remove the Policy:** Remove the policy and explore other opportunities to raise endowment funds for the Hartford Jewish Cemetery Association.
Benefits: Would remove confusion and complication
Drawbacks: Would remove a potentially beneficial community-based approach to cemetery endowment

Staff Recommendation

Moving forward, the staff recommends the following resolution:

All bequests received that were originated with or without our knowledge before June 1, 2021 will be subject to the current 90/10 rule – and 10% will be transferred on the front end to the Hartford Jewish Cemeteries Restoration Fund (JCRF).

All new monies donated – and all new legacy funds/commitments established – after June 1, 2021 will not be subject the *up-front* 10% transfer to the JCRF; instead, the Foundation will remove the funds annually on the *back-end* from the pool of unrestricted grants dollars (see option B).

Grants Committee
Meeting Summary
August 17, 2021

In attendance: Sid Ulreich, Chair, Arnold Greenberg, Jessica Fish, Ethan Goldman, Merrill Mandell, Anne Martha Pitegoff, and Lee Pollock. Also in attendance were Gayle Temkin, Jacob Schreiber and Michael Elfenbaum. Shera Golder, Ted Kaplan, Ed Leshem, Alan Mendelson, David Rosenthal and Jessica Zachs were absent.

I. Community Grants Budget

The current amount available for grantmaking in FY2022 is \$881,139. This is inclusive of a new Grants Reserve Fund established by the Foundation in the amount of \$233,900.

II. Grant Proposals

Jewish Federation of Greater Hartford

Destination Hartford

\$47,625

Guest Presenters – Ben Adler and Heather Fiedler

Destination Hartford has been discussed in various forms over the past 10 years or so. This initiative is designed to help attract new singles and families to move to the Greater Hartford area in an effort to help grow and strengthen the Jewish Community. Connecticut is a “greying” state. The population is older and in order to remain a vibrant Jewish community, we need to attract new people to Greater Hartford. There is competition around the country to attract young Jewish families. With COVID, even more are looking for the right community.

The program has a 3-pronged approach:

1. Marketing (especially via social media)
2. Jobs – create a network that will enable us to help make connections (not specifically help people find jobs)
3. Concierge – one on one help with individuals looking for information and to help make connections

The consultants will create a strategy and a plan to implement. The major current financial needs are centered on the hiring of the marketing consultant and the implementation of the marketing plan. Their intention is to go through a comprehensive research process to learn about the community in order to create an effective marketing campaign designed to highlight Hartford and its Jewish community to make it as attractive as possible to people considering a move. The hope is that once the program is established, it can continue in perpetuity as an initiative of the Jewish Federation.

A lengthy discussion followed the presentation. The main issues the Committee would like more detail on are:

1. What does success look like and how will it be measured?
2. What are the specific goals (short and long term)?
3. Does the consultant really need to go through a comprehensive discovery process? Don't we already know most of what they are looking for to develop a message through previous research? The Committee would prefer to see more spent on execution rather than planning.

4. More funding should be committed to staff (long term). If all committed funds are spent within a year, then how will the community benefit beyond the initial grant period?
5. Can we focus on inreach of people who already live here in addition to outreach?

Upon a motion duly made and seconded, the Committee voted unanimously to table the proposal and convene to reconsider after additional information is provided by the Jewish Federation.

Jewish Family Services

Clinical Services Evaluation

\$30,146

Guest Presenters – Katie Hanley and Laura Rozza

Jewish Family Services would like to engage the expertise of a consultant to conduct a full review of their clinical services practice and provide recommendations to better streamline the agency, develop more effective counseling and increase the revenue generated from these services.

A clinical services evaluation was a long-term goal of Anne Danaher (previous CEO) and is a part of the JFS strategic plan. However, JFS has yet to start this process. With a number of new staff in management positions, the longtime Clinical Services Director in the twilight of her career, COVID and a generally changing landscape, JFS believes this is the ideal time to begin the process. An experienced consultant who can develop a plan as well as assist with implementation is important in allowing JFS to better serve the community, especially as the mental health crisis continues.

Another issue this plan can address is how to better share the available services and skills offered by JFS to the community at large. JFS has found that even within the Jewish community, many people are unfamiliar with these services and often don't think about JFS when seeking help. Additionally, many of these individuals and families may have insurance (which would provide increased revenue) and may think that JFS only serves under-privileged clients. JFS recognizes that some may also feel that privacy could be an issue (seeing others they know while at JFS) and they must find ways to ease this concern of confidentiality.

The consultant will also conduct a comprehensive review of salaries. Katie has reviewed salaries to confirm that JFS is competitive but believes that an independent review will go a long way to appease staff that salaries are reasonable.

In general, the Committee felt that this would be a positive move for JFS and would hopefully help to strengthen them both financially and operationally.

Concern was raised over the JFS budget as well as the impact of PPP; especially since they are projecting a large deficit for FY22. Katie addressed the budget issues and explained that JFS will have to re-submit a budget to the Board now that they have determined to recognize PPP in FY21. Some decisions will need to be made as to how best address the projected deficit.

Upon a motion duly made and seconded, the Committee voted 3-0 with 2 abstentions to recommend a grant of up to \$30,146 for the Clinical Services Evaluation.

There being no further business, the meeting adjourned at 7:05 p.m.

COMMUNITY GRANTS PROGRAM – APPLICATION COVER SHEET

I. CONTACT INFORMATION

Applicant Organization Name: Jewish Federation of Greater Hartford	
Contact Person: Heather Rubin Fiedler	Title: VP, Jewish Education & Leadership
Email: hfiedler@jewishhartford.org	
Telephone: 860-727-6121	Fax: 860.232.5221

II. REQUEST SUMMARY

A. PROGRAM NAME: Destination Hartford	B. AMOUNT REQUESTED: \$47,625
C. TYPE OF SUPPORT FOR WHICH YOU ARE APPLYING: <i>(Select only one)</i>	
<input type="checkbox"/> Seed Funding	<input checked="" type="checkbox"/> Capacity Building <input type="checkbox"/> Special Project
D. SEED FUNDING GRANTS: PLEASE SELECT PRIORITY AREA THAT BEST DESCRIBES THE PROJECT FOR WHICH YOU ARE APPLYING FOR FUNDS: <i>(Select only one)</i>	
<input type="checkbox"/> Jewish Education <input checked="" type="checkbox"/> Jewish Engagement <input type="checkbox"/> Seniors & Aging <input type="checkbox"/> Other	

III. FINANCIAL INFORMATION

Current Annual Operating Budget: \$ 2,635,535 Projected Surplus/ (Deficit): \$ 0

From Applicant's Last Fiscal Year (as reported on most recent IRS Form 990)		FYE: 6/30/20	
Revenue:	\$ 5,949,927	Percent of Expenses for Programs & Services:	87.5%
		Percent of Expenses for Administration:	4.8%
Expenses:	\$ 5,934,754	Percent of Expenses for Fundraising*:	7.7%
		Total:	100%
Comments (optional):			

Please do not include a cover letter, brochures, news articles or other materials unless specifically requested.

Executive Head Signature

Volunteer Head Signature

E-mail completed application form (Cover Sheet, Questions and Budget) and any attachments as a



CAPACITY BUILDING GRANTS PROGRAM – APPLICATION QUESTIONS

PROGRAM DESCRIPTION

1. Describe the proposed initiative. Please include the scope of work, goals, activities to be undertaken, and other relevant information regarding the request and the project time frame. (2 page maximum)

Hartford is not simply the place halfway between New York City and Boston. Infused with culture and a strong Jewish community structure, Greater Hartford provides an attractive home for families and singles looking to escape the chaos and high cost of living of many major metropolitan areas.

Given the challenges for many of the current COVID-19 situation, Destination Hartford is an essential initiative that can infuse our Jewish community with dynamic new residents and enrich our institutions with new participants, members, students and supporters. Many people are looking to leave larger communities and move to areas that are less densely populated, lower cost and with a higher quality of life. Moreover, many individuals are realizing that they can keep jobs they used to commute to, work from home and move to a better region.

Our goal is to attract to the Greater Hartford Community, families and singles who are interested in participating in Jewish life. Attracting Jews who would like to live a committed Jewish life (as defined by them), will strengthen our entire community. We are looking to appeal to Jews from all walks of life, regardless of denomination or affiliation.

Highlighting all that Greater Hartford has to offer in terms of jobs, housing, Jewish life, and culture, we will use a multi-pronged approach to reach our target audience.

- Concierge – In addition to recruitment, the concierge would help potential residents connect with schools, housing, day care, insurance, synagogues, JCC, etc. S/He would coordinate a visitors' program whereby people could visit the community and, for those interested, spend a Shabbat in the area.
- Marketing – Using local and national contacts as well as a defined social media strategy, we will reach out to professional networks, publications, and individuals to promote the benefits of the Greater Hartford Jewish community.
- Job Match – As we have a strong networked community, when potential residents reach out to us, we can connect them with others in their field to further pursue employment opportunities.
- Shalom Greater Hartford – Greater Hartford's Jewish "welcome wagon" will greet and engage new, Jewish families who moved to our community, and introduce them to "all things Jewish" in Greater Hartford.

Destination Hartford is a key goal that emerged from Federation's Community 21 planning process. Federation is already absorbing the majority of staffing costs. However, to achieve success we will need additional, specialized marketing resources to develop and implement a targeted marketing campaign.

We have estimated the costs of this program at \$103,625 over 2 years. Federation has already committed to \$25,000 to be used towards ½ of cost of the marketing consultants' fee. The marketing consultants will provide a full marketing study as well as deliverables including branding and specifics as to where to strategically target our recruitment efforts. In addition, we have requested an additional \$31,000 from the Planning and Allocations Subcommittee to cover costs of implementation of the marketing plan and program. These costs do not include the staffing and in-kind support that the Federation is and will provide.

As this initiative speaks to capacity building and innovation that inures to the benefit of the entire community, we respectfully request a one-year grant of \$47,625 from the Jewish Community Foundation. This will allow us to contract for the complete both the marketing and execution portions of the project.

2. Briefly describe the needs that the proposed initiative addresses. (1 page maximum)

As we understand, Connecticut is a "greying" state. The population is older and in order to remain a vibrant Jewish community, we need to attract **new** people to Greater Hartford. We are looking for individuals and families who are committed to leading an engaged Jewish life. And, while engaged is a broad term, we hope to appeal to people who are interested in building our Jewish community, taking it into the future in ways that are meaningful. This initiative will enable us to reach people who are considering a move from their current location, identify people who are new to our community, and engage them in the opportunities that Jewish Hartford affords. It is through the combination of those currently living in the Greater Hartford Jewish Community and the people we attract to move here that we will grow and flourish well into the future.

3. How will the grant fundamentally enhance the ability of your organization to achieve its mission in the long term? (1/2 page maximum)

The Jewish Federation of Greater Hartford protects and enhances the well-being of Jews worldwide through the values of Tikkun Olam (repairing the world), tzedakah (charity and social justice) and Torah (Jewish learning). By attracting new community members and engaging them in the business of the community, we, potentially, are able to reach not only Federation's goals, but the goals of the entire Greater Hartford Jewish community.

4. Are you planning on engaging a consultant?

- **If so, have you identified a consultant? Describe the selection process and the consultant's qualifications. (1 page maximum)**
- **If a consultant has not been identified, please describe how you determined the job description, role and cost of a consultant. (1 page maximum)**

We are planning to hire an outside consulting firm for the market research. We went through a "Request for Proposals" process and narrowed it down to [Marketing Matters, Ltd.](#) The principals came highly recommended and, upon speaking with them, we became confident that they have a deep understanding of the goals and processes to get this project done. All other work will be done in-house at the Jewish Federation of Greater Hartford.

5. How long will it take to implement the proposed objective(s)? (1/2 page maximum)

We anticipate that the marketing portion of the project will take 4-5 months to complete. This is followed by years of engagement and follow up. We do not necessarily see an end date for that part of the project as we are committed to welcoming new families into the community.

6. If necessary, how will the initiative be sustained beyond the grant funding period (1/2 page maximum) We anticipate that this program that will span several years into the future. The majority of the set up for the project will take place in FY22. After the initial investments from Federation and Foundation are exhausted, the concierge position (part time) along with any future marketing costs (both in terms of personnel as well as ad costs) will need to be absorbed into the Federation budget.

7. In regards to the Logic Model, please indicate what you are going to measure *and how you are going to measure.* We have purchased add-on ability for the Jewish Leadership Academy's Sales Force account to keep track of all metrics. The data base is being set up with "clean data" and will only track information from the Destination Hartford project. From that, we will be able to track and follow up with

8. Please complete the *Logic Model chart* with at least 2 short-term and 2 long-term outcomes. See attached.

AMOUNT AND TERM REQUESTED

Amount Requested: \$47,625

Please complete Budget Form


Project Begin Date: Summer, 2021

Project End Date: Summer, 2022 (marketing, etc. However, we will continue the concierge piece into the foreseeable future)

III. OTHER REQUIREMENTS

The Jewish Community Foundation of Greater Hartford uses Charity Check on GuideStar to verify your organization's nonprofit status/eligibility. Please make sure that your organization's information is updated and current on GuideStar (www.guidestar.org)

Email completed application (including signed cover sheet) to grants@jcfhartford.org

				Agency: Jewish Federation of Greater Hartford	
				Project: Destination Hartford	
				Date: July 23, 2021	
		Community Grants Program			
		Project Budget			
				Year 1	Year 2
				Year 3	
REVENUE		Description	Amount	Amount	Amount
	Support Received	From Federation FY21 Allocations	\$25,000.00		
	Support Pledged				
	Other Support Requested (<i>pending</i>)	From Federation FY22 Allocations	\$31,000.00		
	Program Fees				
	Other (<i>itemize</i>)				
	TOTAL REVENUE		\$56,000.00	\$0.00	\$0.00
		MSA2018			
EXPENSES					
	Personnel Expenses and Benefits, if any (<i>list each position and hours per week allocated</i>)				
	Marketing Consultants	Research and Marketing Media Plan	\$50,000.00		
	Marketing Contractors	Execute the media plan	\$25,000.00		
	Concierge	part of another position to be hired	\$10,625.00		
	VP, Marketing and Communications	In Kind			
	VP, Jewish Education and Leadership	In Kind			
	Subtotal Personnel		\$85,625.00	\$0.00	\$0.00
	Program (<i>non-personnel</i>) Expenses (<i>itemize</i>)				
	Shalom Greater Hartford Materials		6,000.00		
	Subtotal Non-personnel		\$6,000.00	\$0.00	\$0.00
	Capital Expenses	Equipment and furnishings			
		Other			
	Subtotal Capital		\$0.00	\$0.00	\$0.00
	Marketing Costs	Brochures, printed materials	\$2,000.00		
		Media advertisements	\$10,000.00		
		Mailings			
		Other			
	Subtotal Marketing		\$12,000.00	\$0.00	\$0.00
	Infrastructure (<i>itemize</i>)				
	15% Overhead	In Kind			
	Subtotal Administration Overhead		\$0.00	\$0.00	\$0.00
	TOTAL EXPENSES		\$103,625.00	\$0.00	\$0.00
	NET EXPENSES		-\$47,625.00	\$0.00	\$0.00
	AMOUNT REQUESTED FROM JCF		-\$47,625.00		

Develop Your Program Logic Model

Program Name: Destination Hartford

Target Audience: Jews interested in moving to Greater Hartford or who have recently moved here.

Using this template, create your own logic model. Provide information on the specific objectives (including target numbers), the anticipated short-term and long-term outcomes. Make sure the evaluation model is clear, measurable and concrete. This model will be the basis for your final report to the Foundation and the template against which the success of your project will be judged. Please note that while we are interested in Outputs (number of meetings, number of people served, etc.), our key focus will be on Outcomes (benefit to the community).

Inputs	Activities	Outputs	Short-term Outcomes	Long-term Outcomes
<p><i>In order to deliver the services required to address the identified need, our program needs:</i></p> <ul style="list-style-type: none"> • Funding • Staff (DH Coordinator, VP Jewish Ed and Leadership, support staff) • Data base • People interested in moving to Jewish Greater Hartford • Marketing consultants • Marketing plan 	<p><i>To impact our participants in a way that will address the broader need, our program will:</i></p> <ul style="list-style-type: none"> • Contract with marketing consultants. • Marketing consultants will create media plan and recommendations. • Marketing consultants will strategically place ads to attract people the Greater Hartford Jewish Community. • Concierge will help people connect with jobs, community organizations, etc. • Concierge and volunteer corps will connect with new residents to bring them Shalom Hartford welcome boxes. • Concierge, volunteers, and/or community professionals will follow up with new and under affiliated residents to engage them in activities and community organizations. 	<p><i>The following numbers reflect what occurred as a direct result of each of the program's activities:</i></p> <ul style="list-style-type: none"> • Marketing and media plan • Brand identity for Jewish Greater Hartford. • # of ads placed • # of potential new residents contacted. • # of new people who move to the Greater Hartford Jewish Community. • # of new people who join synagogues/attend day schools/join the JCC, etc. • # of people who receive Shalom Hartford baskets. • # of follow-up, engagement conversations 	<p><i>During or immediately following their involvement in our program, participants will:</i></p> <ul style="list-style-type: none"> • Successfully placed ads will attract people to the Greater Hartford Jewish Community. • People will move to the Greater Hartford Jewish Community. • New and current under affiliated residents will connect with and engage in activities and organizations in the Greater Hartford Jewish Community. • Community organizations will think about engagement and programming differently in order to attract new members. 	<p><i>In the long-term, following the achievement of the short-term outcomes, participants will:</i></p> <ul style="list-style-type: none"> • 1500 people will move to and/or newly affiliate with the Greater Hartford Jewish community over a 3–5-year period. • The Greater Hartford Jewish community will thrive and continue to prosper as new residents become involved in the Greater Hartford Jewish community. • Community organizations will grow to meet the needs of the people who live in the Greater Hartford Jewish community.



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Confidential Proposal For



January 29, 2021



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BACKGROUND

Jewish Federation of Greater Hartford is a leading federation with engaging programming, dynamic leadership, successful fundraising, and a strong sense of community. Through the Annual Campaign, volunteer projects, educational initiatives, and social justice advocacy, they are taking action and making a difference. With tikkun olam and tzedakah as the primary drivers, and informed by Jewish tradition and wisdom, Jewish Federation of Greater Hartford is having tremendous impact on those in need in Connecticut, Israel, and around the world.

With the objective to help improve the lives of even greater numbers of people, Jewish Federation of Greater Hartford plans to continue to outreach and expand their donor base. Their timing aligns well with the unprecedented pandemic which has caused an influx of new Jewish residents to the area.

Whether it is young families leaving smaller apartments and homes in the nearby metropolitan areas or those looking to return home to be closer to family members, or the new remote workforce opting to live further from their office hub, the influx to the more balanced environment/more affordable/better quality of life of Greater Hartford has been significant. Over dozens of families have already moved in and the hope is that more will follow.

It is in this context that Jewish Federation of Greater Hartford is embarking on a campaign to welcome and encourage more Jewish people to relocate to this thriving Jewish community. They hope to accomplish this primarily by attracting young families, empty nesters, and others from major metropolitan areas and their suburbs along the east coast and other large cities with significant Jewish populations. With a plethora of strong Jewish options for connecting to Judaism, including Jewish schools, synagogues, organizations, and Federation, as well as a welcoming ethos focused on diversity, Greater Hartford is well poised for continued growth. The current outreach plan contemplates 3 pillars: Marketing/Awareness, Employment Opportunities, and Concierge Service.



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Jewish Federation of Greater Hartford is undertaking an initiative to better understand the mindset of the new community members, to determine key strategies to motivate others, and to implement a marketing plan. Marketing Matters Ltd. has been asked to submit a proposal for research, branding, marketing plan, and implementation in support of this initiative.

OBJECTIVE

The objective of this initiative is to encourage more families that are committed to a Jewish lifestyle to move to Greater Hartford and connect to Jewish Federation of Greater Hartford.

This initiative will explore overall perceptions of Greater Hartford and the Greater Hartford Jewish community, and develop a plan with compelling messaging delivered through relevant channels to reach those most likely to move. It will help position Greater Hartford and its Jewish community in a way that will capture the imagination and satisfy the needs of prospective community members. It will also take into consideration the school calendar and related timing vis-à-vis spring searches/fall move-ins.

PHASE I: STREAMLINED RESEARCH and DISCOVERY

A. Orientation Meeting with Project Team

To ensure an efficient and effective discovery process, and finalize the timetable, we will:

- Review project expectations, potential obstacles, other related efforts, priorities, budgets, and timing
- Obtain key documents: notes from Monday night panel, past 2 year calendar of events (pre-covid and during covid), 2000 Population Study, past Strategic, Marketing or other plans, other research or relevant documents
- Agree upon process and select interviewees for internal and external interviews (see below)



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B. Brand Communications and Media Audit

To gain perspective on the Jewish community in Greater Hartford and Jewish Federation of Greater Hartford, we will:

- Explore imagery and messaging through a review of Federation's existing communications and collateral, including: email blasts, speeches, brochures and flyers, website, press releases, signage, ads, newsletters, videos, blog, social media, etc.
- Review recent press coverage

C. Category Landscape Scan and Best Practices

To understand the landscape, best practices, and potential pitfalls, we will explore Jewish destination campaigns from other North American locales including Memphis (100 new families), Houston, Florida, etc.

- Review websites, social media, brochures, advertising, third-party online Jewish websites/directories, press coverage

D. Internal Interviews – Board, Senior Staff

To better understand the Jewish community in Greater Hartford and Jewish Federation of Greater Hartford from the perspectives of the professionals and engaged lay leaders, and to frame new community member interviews, we will conduct 4 Zoom interviews with the following:

- 2 - 3 Senior Staff, including the person managing the concierge service
- 1 - 2 Engaged Lay Leaders/Board Members
- Each Zoom interview will last approximately 45 minutes
- Objectives for interviews are to explore for the Greater Hartford Jewish community:
 - Strengths and Weaknesses
 - Uniqueness
 - Key Components - Synagogues, Day Schools, Teen Programs, Social Action and Community Service Offerings, Inclusivity Programs, JCC's, Kosher Food, Other
 - Jewish Federation - Key Initiatives, Programs, Physical presence, Outreach efforts, Other
 - Employment Opportunities
 - Current Working Campaign Name



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E. External Interviews – New Community Members

To understand perceptions of new Jewish community members, we will conduct 6 Zoom interviews with the following:

- 1 – 2 active realtor(s) who helped place new community members
- 4 – 5 new community members including young families and empty nesters
- Each Zoom interview will last approximately 30 minutes and will be scheduled by Jewish Federation of Greater Hartford
- Objectives for interviews are to explore:
 - Motivations for moving to area
 - Research process prior to deciding to move
 - Awareness and Perceptions of Jewish community – absolute and relative to other relevant Jewish communities
 - Strengths and Weaknesses
 - Uniqueness
 - Jewish Community Key Components – Synagogues, Day Schools, Teen Programs, Social Action and Community Service Offerings, Inclusive Programs, JCC's, Kosher Food, Other
 - Jewish Federation – Knowledge of and Experience with Key Initiatives, Programs, Physical presence, Outreach efforts, Other
 - Media Habits
 - Relevance of Employment Opportunities
 - Current Working Campaign Name

PHASE II: STRATEGIC ANALYSIS, RECOMMENDATIONS, MARKETING PLAN

A. Presentation of Key Findings, Insights, and Strategic Opportunities

We will distill and analyze all the information gathered in the Streamlined Research and Discovery, and in a working meeting with the Project Team, we will present Key Findings, Insights, and Recommendations considering:

- What makes Greater Hartford Jewish community relevant and motivating to young families and other potential new community members (i.e. what are people looking for, for themselves and their children, what will best serve their needs)?



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- What differentiates Greater Hartford Jewish community from other communities?
- What is authentic about Greater Hartford Jewish community based on its history, current offerings, and strengths?
- How do we ensure that we are adequately communicating all via name/logo/tagline/brand look and feel/messaging?
- How do we leverage the networks of new community members?

B. Develop Marketing Plan

Based on the Working Meeting with the Project Team, we will develop the plan to address key target audience motivations, and create the messaging for each segment that is relevant, authentic, and compelling, as follows:

Target Audience Messaging

Marketing Matters will create key messaging for each target audience segment, to guide creation of meaningful marketing and communications materials that will motivate prospective new community members.

Vehicles and Plans

We will develop Marketing Plan strategies and specific tactics to reach the prospective community members effectively and efficiently. The Plan will be based on the **estimated** available \$25K implementation budget and \$12K media budget (to be confirmed). The Plan will include cost estimates and schedule and **will consider**:

- Brand
 - Name, Tagline, Logo
- Online
 - Eblasts/Ads on Jewish, Parenting and Other sites
 - Google AdWords, Facebook ads
- Social Media
 - Facebook, LinkedIn, Instagram
- Print, Outdoor unlikely based on current budget
- Website
 - Microsite (SEO), Current website revisions/additions
- Direct Mail, E-mail Campaign



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- Newsletter, Brochure
- Public Relations
 - Story plan, Press kit, Press coverage in local papers
- Video
- Speeches and Talk Points
- Community Engagement
 - Brand ambassadors, Events, Collateral, Signage
- Conferences/Trade shows
 - Participation, Booth
- Listings (e.g. Chamber of Commerce)
- Potential Financial Incentives and Other Programs

PHASE III. IMPLEMENTATION OF MARKETING PLAN

Marketing Matters would manage implementation of the approved Marketing Plan including brand identity, content development, and campaign management across platforms.

WORKING ARRANGEMENT

Jewish Federation of Greater Hartford will provide Marketing Matters Ltd. with background, any relevant internal reports/surveys, historical information, marketing and communications materials, collateral, etc., as well as scheduling of interviews, relevant to the development of this project. We will work closely with Jewish Federation of Greater Hartford, conducting interim discussions with Project Team members as necessary.



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TIMING AND FEES

Phase	Activity	Timing	
Phase I	Research and Discovery	February - March	Included in Phase II
Phase II	Strategic Analysis, Recommendations, Marketing Plan	March - April	\$25K
Phase III	Implementation <ul style="list-style-type: none"> • Creative Development including logo and ads • Management of Plan 	April - Onward	\$25K* <i>(excludes \$1K per month additional media fees)</i> *Based on current budget – to be confirmed upon approval of Marketing Plan

Fees

The fee for this project is as follows: Phase I and Phase II: \$25,000, Phase III: \$25,000*. Phases I and II will be billed 50% upon initiation and 50% upon completion. Phase III billing schedule will be determined upon approval of Marketing Plan.

*Based on current budget – to be confirmed upon approval of Marketing Plan



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Reimbursable Expenses

Ancillary expenses related to the execution of this project would be additional. Such expenses could include: printing and production, presentation expenses such as mock-ups and comps, work requiring over and above 2 rounds of revisions, professional photography, postage, travel, messengers, telephone, and related out-of-pocket expenses. All expenses over \$200 will be approved by Jewish Federation of Greater Hartford in advance.

Additional Services and Scheduling Changes

In the event that Jewish Federation of Greater Hartford requests additional services not described in this proposal, or services resulting from changes of work already completed at Jewish Federation of Greater Hartford's request, these will be estimated for Jewish Federation of Greater Hartford's approval and invoiced in addition to the fees included in this proposal.

Confidentiality

Marketing Matters Ltd. acknowledges its responsibility both during and after the term of its engagement to use all reasonable efforts to preserve the confidentiality of any proprietary or confidential information disclosed by Jewish Federation of Greater Hartford to Marketing Matters.

Notwithstanding the above, Marketing Matters' obligation to maintain the confidentiality of any such information that it maintains shall not extend to information already in the public domain.

Cancellation

This agreement shall become effective upon signing and shall continue until project completion or until terminated in writing by either party. In the event of cancellation, Jewish Federation of Greater Hartford shall compensate Marketing Matters for any work completed up to the time of cancellation plus reimbursable expenses.

**Marketing Matters Ltd**

If you are in agreement with this proposal, please sign and return one copy to us at Marketing Matters Ltd., 500 Mamaroneck Avenue, Suite 320, Harrison, NY 10528.

Marketing Matters Ltd.

Tara Slone-Goldstein

Karen Everett

Date

Date**Jewish Federation of Greater Hartford**

Ben Adler, Board Member

Heather Fiedler, Vice President

Date

Date



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About Marketing Matters Ltd. www.marketingmattersltd.com

Marketing Matters is a boutique firm of creative problem solvers who love building brands and businesses. We specialize in branding, marketing planning, and marketing communications - from strategy to creative implementation.

Founded in 1996, the firm's mission is to help its clients add value to their organizations through increased marketplace performance. Marketing Matters is known for its fresh thinking, strategic ground-setting, and actionable recommendations. We leverage experience, analysis, and break-through creativity to generate results.

Marketing Matters Ltd. builds a working partnership with each client based on a thorough understanding of business objectives. The relationship is collaborative, working with decision-makers to address their challenges. Our guiding principles are: quality and value, collaboration and action, smart simplicity, and respect for time and budget. Our success is demonstrated by the fact that our clients typically engage us for multiple initiatives.

Our Unique Capabilities

- Extensive professional experience in nonprofits provides deep understanding of challenges facing growing nonprofit organization
- Deep experience helping nonprofits tell their stories to donors
- Corporate experience helping organizations build employee engagement, create volunteer programs, and launch foundation
- Nonprofit practice includes wide range of organizations, from educational to communal <http://marketingmattersltd.com/work/clients/>
- Longstanding partnerships with design, web, seo resources
- Active lay leaders in building community
- Customized approach for each client, with perspective that is:
 - Long-term and Innovative, Beginning with an in-depth understanding of what currently is and moving toward an expansive imagining of what could be
 - Strategic and Action-oriented, Determining high-level strategies and developing tactical plans for implementation
 - Creative and Compelling, Sharing the story, explaining the impact, visually communicating the need, encouraging support



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Tara Slone-Goldstein, Founder

Tara Slone-Goldstein, President of Marketing Matters, has over 20 years of experience in nonprofits and for-profits, helping to launch and build organizations. She creates a working partnership with each client based on a thorough understanding of objectives. Working with decision-makers, the focus is collaboration, effectiveness and efficiency.

Prior to founding Marketing Matters, Tara was Vice President of Marketing for Dawson Home Fashions and Vice President of Marketing for Revlon Consumer Products. She began her career in product management at Bestfoods working on Hellmann's Mayonnaise.

At UJA-Federation of NY, Tara serves on the Jewish Life Cabinet. Tara is also a parent advisor to J-Teen Leadership, and on the Executive Board of The Jewish Education Project where she is a past board chair. She is also a past trustee of Schechter Westchester and past co-president of the Emelin Theatre.

Tara received her M.B.A. in Marketing and International Business with honors from New York University Graduate School of Business and received her B.A. with honors from George Washington University.

Karen Everett, Principal

Karen Everett possesses the unique combination of perspective and talent as both a seasoned marketing professional and creative designer, with over two decades of experience in marketing and communications.

Prior to joining Marketing Matters, Karen was Director of Strategy, Admissions and Outreach at Schechter Westchester, having overseen the relaunch and reinvigoration of the school's marketing and admissions efforts. She spent 10 years working for Grey Advertising and DMB&B in account management on various Kraft-General Foods brands and food associations, as well as for Meredith Publishing developing promotions for national advertisers.

Karen served as National Communications Chair of Hadassah, Women's Zionist Organization of America, and was a past National Board member. She is also on the Executive Board of The Jewish Education Project, with responsibility for redesign and relaunch of the organization's website. She is a past trustee at the Schechter Westchester.

Karen earned her B.A. Magna Cum Laude in sociology from Princeton University, and her A.A.S. Magna Cum Laude from the New York School of Interior Design.



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Client List (Partial)

Nonprofit

- **A Kids Brain Tumor Cure**, enabling pediatric brain cancer research
- **Brand Israel Group**, focused on the image of Israel in the United States
- **Center for Jewish Life**, Hillel at Princeton University
- **Dror Israel**, educating for a just and equal society
- **Elsevier Foundation**, supporting the science, medical and technical communities in developing countries
- **Holocaust & Human Rights Education Center**, educating against hate
- **Israel Sci-Tech Schools Network**, Israel's largest independent educational network and leader in sci-tech education
- **Liberty Science Center**, offering science learning onsite, offsite and online
- **Long Island University**, private university
- **Manhattan JCC and Mid-Westchester JCC**, community centers
- **Rodeph Sholom School**, Jewish day school
- **Schechter Westchester/Leffell School**, Jewish day school
- **The College Board**, connecting students to college opportunities
- **The Conference Board**, business membership organization
- **The New Jewish Home**, eldercare network
- **The Tel Aviv Foundation**, supporting the city of Tel Aviv
- **Westchester Jewish Council**, community relations network
- **Wexner Heritage Foundation**, leadership development organization

Consumer

- **Coty Inc.**, international fragrance and cosmetics company
- **Entenmann's**, baked goods company
- **Gertrude Hawk Chocolates**, regional chocolate manufacturer
- **Houlihan Lawrence**, regional realtor
- **Park International Publishing**, independent book publisher
- **Swiss Army Brands, Inc.**, marketer of knives, watches, sunglasses
- **Vandenberg**, townhouse realtor
- **Zoland**, diamond jeweler

B-to-B

- **Affinity Solutions**, loyalty rewards company
- **CBXmarket**, fixed income online investment platform
- **Electronic Land Services**, title insurance firm
- **Elsevier Science**, publisher of science, medical and technical information



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- **Endicott Group**, investment and advisory for middle-market financial institutions
- **Exec-Comm**, executive communications skills firm
- **Howard-Sloan Legal Search, Inc.**, executive search firm
- **H.W.Wilson**, database publisher
- **IMSA**, global executive search network
- **Kroll Inc.**, corporate investigations and risk consulting firm
- **Stephen-Bradford Search, Inc.**, executive search firm

Services

Services are always tailored to individual client's objectives.

- Brand Strategy
 - Mission, Positioning, Values
 - Brand Identity
 - Brand Architecture
 - Messaging for Key Targets
- Internal Communications
 - Brand Activation Plans
 - Training Workshops
 - Team Building
 - Employee Engagement
 - Brainstorming Sessions
 - Communications Tools
- Research
 - Focus Groups, Interviews
 - Online Surveys
 - Industry and Competitive
- Marketing
 - Project Management
 - Marketing Plans
 - Launch Implementation
 - Presentations, Brochures, Reports, Viewbooks
 - Advertising, PR
 - Website, Social Media
- Development
 - Strategic Plans
 - Campaigns
 - Events
 - Donor Presentations

COMMUNITY GRANTS PROGRAM – APPLICATION COVER SHEET

I. CONTACT INFORMATION

Applicant Organization Name: Jewish Family Services of Greater Hartford	
Contact Person: Laura Maltz Rozza	Title: Director of Grants
Email: Lrozza@jfs Hartford.org	
Telephone: 860-236-1927	Fax: 860-236-6483

II. REQUEST SUMMARY

A. PROGRAM NAME: Clinical Services Evaluation	B. AMOUNT REQUESTED: \$30,146
C. TYPE OF SUPPORT FOR WHICH YOU ARE APPLYING: <i>(Select only one)</i>	
<input type="checkbox"/> Seed Funding	<input checked="" type="checkbox"/> Capacity Building
<input type="checkbox"/> Special Project	
D. SEED FUNDING GRANTS: PLEASE SELECT PRIORITY AREA THAT BEST DESCRIBES THE PROJECT FOR WHICH YOU ARE APPLYING FOR FUNDS: <i>(Select only one)</i>	
<input type="checkbox"/> Jewish Education	<input type="checkbox"/> Jewish Engagement
<input type="checkbox"/> Seniors & Aging	<input type="checkbox"/> Other

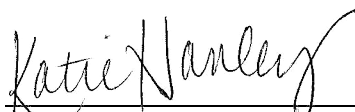
III. FINANCIAL INFORMATION


Current Annual Operating Budget: \$ \$7,015,081.04 (includes Care at Home)

Projected Surplus/ (Deficit): \$ -\$150,093.04

From Applicant's Last Fiscal Year (as reported on most recent IRS Form 990)		FYE: 2020	
Revenue:	\$ 4,693,974	Percent of Expenses for Programs & Services:	88%
		Percent of Expenses for Administration:	8%
Expenses:	\$ 4,805,057	Percent of Expenses for Fundraising*:	3%
		Total:	100%
Comments (optional): Our 990 does not note Programs & Services and Administration separately. The percentages for Programs & Services, and Administration were instead pulled from our Audit.			

Please do not include a cover letter, brochures, news articles or other materials unless specifically requested.


Executive Head Signature


Volunteer Head Signature

E-mail completed application form (Cover Sheet, Questions and Budget) and any attachments as a PDF document to grants@jcfhartford.org



CAPACITY BUILDING GRANTS PROGRAM – APPLICATION QUESTIONS

PROGRAM DESCRIPTION

1. Describe the proposed initiative. Please include the scope of work, goals, activities to be undertaken, and other relevant information regarding the request and the project time frame. (2 page maximum)

Jewish Family Services of Greater Hartford (JFS) is an accredited full-service health and human services organization, providing critical support to those who need it the most. We reach thousands of individuals each year inclusive of religion, race, ethnicity, national origin, disability, gender, and sexual orientation. JFS serves as a one-stop-shop for all basic human needs, from food, to clothing, to employment, to mental health. We offer the highest quality services that transform people's lives, no matter their income level and especially when they have nowhere else to turn.

Now more than ever during the pandemic, JFS's licensed outpatient clinic is a pillar of support for the community. We offer a full scope of individual counseling services and psychiatric care with licensed clinicians as well as medication-based treatment. We specialize in supporting older adults; Holocaust survivors; children; adolescents; families; and individuals living with intellectual disabilities, developmental disabilities, and autism. Overall, JFS provides a unique, holistic continuum of care that treats the whole person, simultaneously supporting mental health while also making sure that clients can put food on the table (through our food pantry), clothe their families (clothing closet), find employment (employment transition services), etc.

The pandemic brought with it an influx of calls seeking counseling services. Though we have stretched our services to some degree, our capacity limited our ability to quickly and fully respond to the need. During this mental health crisis, JFS needs to be a strong source of support to continue serving the community in this way, both now and in the long term.

Our goal is to engage in a year-long assessment process for our clinical services department to help us increase capacity, increase revenue, streamline our work, support leadership, and ultimately grow to meet the evolving needs of the community. A clinical services evaluation is something that JFS has never done before, and we feel that in this moment in particular, it is vitally important that we perform a thorough, honest analysis of our clinical services department to improve our operations, and in turn, what we offer the community.

This work is even more important, as we have a budgeted deficit this fiscal year, and we are facing the need to address low revenue from clinical services. Ultimately, embarking on this process will be an income generating investment by allowing us to accomplish the following goals in the future implementation phase:

- Streamline insurance billing processes. This allows us to ensure that we are billing insurance companies for all the things we can potentially bill for. **This will increase revenue, thus reducing our need to rely on donor dollars to support our clinical practice**
- Help us become more competitive in the marketplace and bring in new clients in the following ways:
 - Streamline processes that free up clinician time, **opening more space in their schedule to see additional clients**
 - **Meet the pandemic-related need**
 - Improve our **outreach**

- Better utilize the existing competencies of our clinicians and grow their skills through professional development that can result in **new client-bases**
- Explore the concept of hiring a new case manager who would remove that task from clinician's plates, thus **increasing their billable hours**
- Help us **explore new business models** including the growth of existing and new revenue-generating collaborations
- Improve the client experience and advance our **word-of-mouth recommendation prospects**
- Develop more **effective and efficient** practice-focused delivery of behavioral health services
- **Streamline referral sources** so that doctors' offices can easily refer their patients to us, and vice versa
- Supporting our clinic's **growth in the long term**
- Ensure that we put data collection processes in place that help us **maintain our accreditation**, which is an essential baseline to operating a successful clinical practice. Efficient data collection will also allow us to make **appropriate and well-timed changes to our operations as needed in the future**.

This year our clinical services department has experienced an incredible amount of change and transition:

- We shifted to a new Electronic Health Record (EHR) software system, which has, in many ways streamlined our work. It also presented a steep learning curve for many of our clinicians, both in terms of user interface, and in terms of changes in workflow. The rollout has largely been successful, however, some of the workflow changes were met with resistance, and there are key EHR system capabilities that we are not currently utilizing.
- We have a new CEO who brings a fresh set of eyes and experiences to JFS as a whole. She is an LMSW (Licensed Master Social Worker) and therefore brings a unique lens to our clinical services department.
- We developed a new position, promoting our Clinical Practice Manager to a newly created role, Director of Business Systems & Analytics. In many ways-- from intake over the phone, to email inquiries, to using Zoom, to entering client data in our EHR-- technology plays a vital role in our clinical services department. The new Director of Business Systems & Analytics position was designed to support and bolster our technology "know how", and our capacity to track key data that enables us to maintain our accreditation. The goal of this role is to enhance our ability to analyze data, report on it, and make strategic decisions with it. Our ability to accomplish these goals is only as successful as our capacity to collect the raw data. Though this has been even more challenging during the pandemic, data collection has long been a growth edge for our agency. In particular, having this role already in place gives us the capacity to maintain the work well after the evaluation and implementation phases end.
- The biggest change we faced was, of course, the pandemic itself. The crisis forced a complete shift in the way that clinicians did their job. Many did not use technology much in their work before the crisis, and yet quickly found themselves shifting fully to an online telehealth format to see clients. Many individuals, both clients and clinicians, struggled with the transition.

2. Briefly describe the needs that the proposed initiative addresses. (1 page maximum)

Other important factors that led us to embark on this process:

- Director of Clinical Services, Janice Rothstein, has served as our fearless leader for over 35 years. We want to capture the strength and consistency she brings to JFS and prepare for a future change.
- Our strategic plan, developed under our previous CEO, Anne Danaher's administration, highlights the following goals:
 - "Monitor and hold clinicians accountable for productivity standards by analyzing productivity reports and discussion with clinicians."
 - "Monitor weekly reports of clinical schedules to determine opportunities to add new clients to a clinician's case load."
 - "Finalize discussions of time frame with each manager to include any possible identification of internal successors. Date must be selected."

In terms of priority, these are the first items listed in the strategic plan document.

- Our clinicians are incredibly skilled at what they do. It is essential that the clinical services evaluation be a genuine and authentic process where we all work together to come up with generative questions – big questions that will get to the heart of what JFS's clinical services needs in order to thrive well into the future. This process will be co-created together with the clinicians, consultant, management, and other stakeholders.
- Our ultimate goal is to support clinicians and help them grow in their roles. Some already specialize in specific mental health conditions and treatments. We believe that we are likely not supporting their strengths to the fullest degree possible, nor are we sharing information about their skills with the public. The first step is to determine both our current capacity in this way, and to gauge interest in any areas of professional growth. Then we plan to offer clinicians professional development opportunities while also improving community outreach to better support existing clients, and to draw in new clients.
- We have an extraordinary team of clinicians who have provided an extremely high level of care during the pandemic. Many serve as case managers in addition to their clinical work, helping clients access various resources that they are eligible for. This work is essential and critically needed, but unfortunately, insurance does not cover this vital service. One of our goals is to determine whether it makes financial sense to hire a case manager whose hourly rate would be lower than that of a clinician.
- In keeping with our strategic plan and our Performance Quality Indicators (PQI) process (which is mandated as part of our accreditation), we periodically evaluate clinician "productivity", i.e. collect data that details how clinicians spend their time and the number of clients clinicians see. This information is incredibly valuable, but there is a sense from some clinicians that it does not show a complete picture. Our goal is to present productivity data that is inclusive of a wide scope of relevant data and includes input from the clinicians. Streamlining workflows and making better use of our EHR-- in terms of client scheduling and intake for example-- could contribute to increased capacity. A consultant can take a wider view of this and help us identify this and other ways to enhance productivity in both a clinician and client-focused way.

3. How will the grant fundamentally enhance the ability of your organization to achieve its mission in the long term? (1/2 page maximum)

JFS as an agency is 109 years old, and in addition, we are fortunate to have staff with a great deal of longevity. Over time, we developed many processes that have not changed in several years. The COVID-19 pandemic upended the way business is done, and this-- coupled with the energy of our new CEO and our ability to tap into our new EHR resource—makes this is the perfect moment to engage in this process. Though a clinical services evaluation was a long-term goal of our previous CEO as highlighted in our strategic plan, this process is something JFS has never embarked upon. With the well-documented mental health crisis we are facing both locally and nationally, this feels like the work we must be doing as an agency in this moment to ensure that we effectively serve our community. In addition, the stronger use of our EHR and improvements to our Performance and Quality Indicators process will directly feed our ability to seek grant funding; thus supporting JFS's sustainability overall, and in turn our ability to serve clients.

4. Are you planning on engaging a consultant?

- **If so, have you identified a consultant? Describe the selection process and the consultant's qualifications. (1 page maximum)**

Our goal is to engage in a clinical services evaluation with an experienced consultant who can illuminate a path to the growth and adaptation to change that are so important in allowing us to better serve the community, especially as the mental health crisis continues. Experts across the mental health field note that the ripple effect of the COVID-19 pandemic will be felt well into the future. Doing this work now equips us with the tools we need to meet ongoing and evolving needs. Initially we were unsure whether a clinical services evaluation was a common enough need that there were consultants available to perform this work. JFS's former CEO, Anne Danaher, recommended that we reach out to leadership at another local agency, however, with the pandemic-related mental health crisis, they did not have the capacity to engage in this process with us. We then reached out to the Network of Jewish Human Service Agencies (NJHSA), our trade association that supports over 140 Jewish Family Services and other similar agencies across the country. Many of these organizations offer clinical programs just like ours, and through NJHSA, we were referred to Dr. Jenni Frumer. Dr. Frumer has over 38 years of experience in the nonprofit field, and she is the retired CEO of a Jewish Family Services in Florida that faced similar challenges in their clinical department, which she successfully restructured. She is a Clinical Social Worker herself, and having been on both sides of the equation, she is uniquely positioned to provide a perspective that we simply would not be able to find elsewhere.

We spoke at length with Dr. Frumer and she was actively familiar with each and every point we identified, responding with intuitive, insightful questions. We now have her written plan in hand (which can be provided upon request) which outlines a four-phase strategy for evaluating, examining, and addressing several key issues and opportunities in our clinical services department. This work will help us ensure that we maintain our accreditation, maximize our ability to bill insurance, maximize our ability to see new clients, and grow our practice, thus setting us up for the future and ultimately leading to a healthier and more stable community.

- **If a consultant has not been identified, please describe how you determined the job description, role and cost of a consultant. (1 page maximum)**

Not applicable.

5. How long will it take to implement the proposed objective(s)? (1/2 page maximum)

This first year will serve as an evaluation phase, and over the course of the year, we will work with Dr. Frumer to gather data that will help us accomplish our goals. Though we will implement elements of her recommendations throughout, the majority of the changes will be executed once the evaluation phase has ended. We anticipate that the following year will serve as an implementation phase where we will apply Dr. Frumer's findings. One of the key benefits of working with a third-party expert in the field is that an outside voice brings a fresh perspective that may be received differently than direction coming solely from an internal supervisor or colleague. With our final recommendations in hand at the close of the evaluation phase, we will have a smooth path forward as we grow together to make JFS's clinical services the best they can be during the implementation phase.

6. If necessary, how will the initiative be sustained beyond the grant funding period (1/2 page maximum)

It will take some time to do this right. While we will begin putting the recommendations outlined by our consultant into practice while the evaluation process is underway, we will likely not be able to begin work on all of the recommendations until after the process is closed out and we begin the implementation phase. We anticipate that many of Dr. Frumer's recommendations will be income generating, and those activities will take some time to ramp up. Overall, we view this work not as an overnight change, but instead as a long-term process that sets us up for a successful future that enables us to remain flexible in the face of adversity and change.

7. In regards to the Logic Model, please indicate what you are going to measure *and* how you are going to measure.

Success will be measured by our ability to complete the following, as measured through a variety of applicable benchmarks. The consultant's work during the evaluation phase will be broken down into four sub-phases, as noted in her proposal:

Sub-Phase 1: Information gathering

Key Activities:

- a) Review of internal documents including clinician productivity data, client demographic data, financial information, staff credentials, etc.
- b) Interviews with relevant staff and stakeholders. Confidential survey of program staff
- c) Conduct focus groups of staff, management, stakeholders

- **Sub-Phase 1 Outcome 1:** Better understand our current capacity overall
Measured by: Consultant's ability to close out sub-phase 1 (1-3 months) and move forward to sub-phase 2
- **Sub-Phase 1 Outcome 2:** Consultant will determine current capacity in terms of clinician certifications, credentials, and experience; and based on these, JFS will start training clinicians and staff to grow capacity
Measured by: JFS beginning the steps to launch various staff trainings. This can take some time in terms of scheduling on both the clinician's part and the availability of trainings. Goal is to complete first round of essential trainings by the close of the grant period

Sub-Phase 2: Assess clinical practice

Key activities:

- a) Begin assessing clinical practice for sustainability, service competition, and identification of duplication of resources, to maximize strengths and increase partnerships and collaborations
- b) Facilitate the creation of a [MacMillian Matrix](#) to examine specific elements of our practice

- **Sub-Phase 2 Outcome 1:** Hone in on specific elements of our practice to determine what is working and what could be improved

Measured by: Ability to successfully develop MacMillian Matrix

- **Sub-Phase 2 Outcome 2:** Shift from information-gathering (sub-phase 2) towards next step of co-creating an inclusive conversation and brainstorming (sub-phase 3)

Measured by: Consultant's ability to close out sub-phase 2 (1-3 months) and move forward to sub-phase 3, Appreciative Inquiry

Sub-Phase 3: Facilitate [Appreciative Inquiry](#) process

Key activities:

- a) Determine participants, and generative questions for the Appreciative Inquiry process, which includes 4 phases/stages
 1. Discovery stage- identifies the best of what is
 2. Dream stage- explores what might be, envisioning results
 3. Design stage- explores what should be or the ideal, co-constructing
 4. Destiny stage- explores how to empower, deployment/implementation, sustaining

This process provides a blueprint for the improvement, enhancement of existing practices, and the development of innovative strategies.

- **Sub-Phase 3 Outcome 1:** Ability to successfully develop Appreciative Inquiry process.

- **Sub-Outcome:** All levels of staff will understand how their actions and skills impact JFS's bottom line

- **Measured by:** Consultant's ability to close out sub-phase 3 (1-3 months) and move forward to final sub-phase 4 with key information gathered through Appreciative Inquiry process

Sub-Phase 4: Final phase pulling together findings from all previous phases

Key activities:

- a) Consultant prepares report and recommendations
- b) Consultant discusses draft with CEO and others
- c) Consultant conducts final report discussion groups with designated stakeholders
- d) Discuss objectives and any future steps

- **Sub-Phase 4 Outcome 1:** JFS is able to move forward with recommendations in hand that lay out specific next steps in our path forward to growth

- **Sub-Outcome a:** JFS feels prepared to take on new clients, increase outreach, and engage in other next steps

- **Sub-Outcome b:** JFS will have determined the financial need for a case manager to perform work currently being completed by clinicians

- **Measured by:** Having final report completed. Conversations between consultant, CEO, and other staff

In the following year, we will begin work on the implementation phase of the process. This phase will encompass an entirely different set of activities, goals, and outcomes.

8. Please complete the *Logic Model chart* with at least 2 short-term and 2 long-term outcomes.

AMOUNT AND TERM REQUESTED

Amount Requested: \$ 30,146

Please complete Budget Form

Project Begin Date: October 2021

Project End Date: October 2022

III. OTHER REQUIREMENTS

The Jewish Community Foundation of Greater Hartford uses Charity Check on GuideStar to verify your organization's nonprofit status/eligibility. Please make sure that your organization's information is updated and current on GuideStar (www.guidestar.org)

Email completed application (including signed cover sheet) to grants@jcfhartford.org

Develop Your Program Logic Model

Program Name: Jewish Family Services of Greater Hartford, Clinical Services Evaluation

Target Audience: JFS internal agency and ultimately the community

Using this template, create your own logic model. Provide information on the specific objectives (including target numbers), the anticipated short-term and long-term outcomes. Make sure the evaluation model is clear, measurable and concrete. This model will be the basis for your final report to the Foundation and the template against which the success of your project will be judged. Please note that while we are interested in Outputs (number of meetings, number of people served, etc.), our key focus will be on Outcomes (benefit to the community).

Inputs	Activities	Outputs	Short-term Outcomes	Long-term Outcomes
<p><i>In order to deliver the services required to address the identified need, our program needs:</i></p> <p>Work with consultant to perform a clinical services evaluation</p> <p>Staff Training (training-related materials, and trainers)</p>	<p><i>To impact our participants in a way that will address the broader need, our program will:</i></p> <p>Consultant Work Sub-Phases:</p> <ol style="list-style-type: none"> 1. Information gathering 2. Assess Clinical Practice 3. Facilitate Appreciative Inquiry 4. Develop report <p>Overview of JFS goals: Consultant will evaluate our clinical practice and illuminate a path to growth that will help us:</p> <ul style="list-style-type: none"> • Ensure that we maintain our accreditation • Maximize our ability to bill insurance • Maximize our ability to see new clients and grow our practice • Set us up for the future 	<p><i>The following numbers reflect what occurred as a direct result of each of the program's activities:</i></p> <p>Until we begin work with the consultant, we will not have a full sense of how deep our current gaps are, however in the future once the evaluation phase ends and the implementation phase begins, our goal will be to measure the following:</p> <p>X% increase in insurance revenue</p> <p>X% increase in clients</p> <p>X% increase in clinician productivity</p> <p>X% decrease in wait time from client's initial point of contact to first appointment</p> <p>X% increase in referrals</p> <p>X increased number of referral sources</p>	<p><i>During or immediately following their involvement in our program, participants will:</i></p> <p>Better understand our current capacity overall</p> <p>Better understand our current capacity in terms of staff abilities: Consultant will determine current capacity in terms of clinician certifications, credentials, and experience; and based on these, JFS will start training clinicians and staff to grow capacity</p> <p>Key staff will participate in Appreciative Inquiry process. As a result, all levels of staff will understand how their actions and skills impact JFS as a whole, and JFS's bottom line</p> <p>Lay out specific next steps in our path forward to growth</p>	<p><i>In the long-term, following the achievement of the short-term outcomes, participants will:</i></p> <p>JFS will have:</p> <ul style="list-style-type: none"> • Increased overall capacity • Greater and more diversified income <ol style="list-style-type: none"> a) Streamlined and improved insurance billing b) Improved ability to seek grants • Stronger use of our EHR • Better grant-seeking ability and continued accreditation through improved PQI data • Taken on additional clients smoothly and effectively • Met the pandemic and non-pandemic mental health needs of the Jewish community

Inputs continued <i>In order to deliver the services required to address the identified need, our program needs:</i>	Activities continued <i>To impact our participants in a way that will address the broader need, our program will:</i>	Outputs continued <i>The following numbers reflect what occurred as a direct result of each of the program's activities:</i>	Short-term Outcomes continued <i>During or immediately following their involvement in our program, participants will:</i>	Long-term Outcomes continued <i>In the long-term, following the achievement of the short-term outcomes, participants will:</i>
	<p>Each of these ultimately lead to a healthier and more stable community</p> <p>Staff training: Consultant will determine the capacity already held by our clinicians in terms of specialization, and we will provide trainings that support and grow their skills (specialized fields, technology, core competencies, etc.). This will ultimately allow us to streamline processes, and market specialties, thus increasing revenue</p> <p>Productivity Data Overhaul: Develop and present productivity data that is inclusive of a wide scope of relevant data and includes input from the clinicians to present during our PQI process</p>		<p>JFS will be poised for growth and ready to take on new clients, increase outreach, and engage in other next steps</p> <p>We will have determined the financial need for a case manager to perform that work, which is currently being completed by clinicians</p>	<p>JFS will have:</p> <ul style="list-style-type: none"> • A more self-sustaining program • Streamlined workflows that: <ul style="list-style-type: none"> a) make better use of our EHR and free up clinician time to see more clients b) Improve client experience • Supported leadership and staff through training • Improved our outreach and marketed clinician competencies • Hired/not hired a case manager depending on recommendation • Explored new business models, collaborations, and referral sources

–Please see following page for chart outlining four key areas identified by JFS to be reviewed by the consultant, and the ways each overlaps–

Clinical Services Assessment

- Focus on both individual clients and the community itself (in a sense, the community is our client, for example, meeting NEJA's needs). Perhaps perform needs assessment
- Surveying client satisfaction
- Reviewing service options (e.g. offer different hours based on need)
- Better serve clients
- Develop support around trends we are seeing in:
 - Older adults
 - Children
 - Adults
- Intake needs - make as accessible as possible (e.g. text inquires, online intake, etc.)

- Insurance reimbursement
- Coding
- Maximizing EHR functions e.g. scheduling
- Marketing our services
- Seeking grants to support the work and the staff
- Review policies, procedures, and space needs
- Performance and Quality Improvement (PQI)
- Intake process



- Professional development
- Areas of specialty staff may already have or wish to explore
- Develop ways to gather regular input from clinicians so they feel heard, appreciated, and as though their clinical insight informs business decisions
- Goal to build satisfaction in their work
- Explore other compensation models for clinical work (we contract with psychiatrists, perhaps explore similar model with therapists)

- Professional development opportunities
- Support their heavy responsibility in supervising clinicians
- Support them in developing supervision strategies
- Reinforce strengths
- Identify areas of growth potential



**Community Grants Program
Project Budget**

Agency: Jewish Family Services of Greater Hartford
Project: Clinical Services Evaluation

Date: July, 2021

REVENUE	Description	Year 1 Amount	Year 2 Amount	Year 3 Amount
Support Received				
Support Pledged				
Other Support Requested (<i>pending</i>)				
Program Fees				
Other (<i>itemize</i>)				
Improved insurance billing	Projected, not confirmed	\$0.00	TBD	TBD
TOTAL REVENUE		\$0.00	\$0.00	\$0.00
EXPENSES				
Personnel Expenses and Benefits, if any (<i>list each position and hours per week allocated</i>)				
Consultant work	Includes 18% discount provided by consultant because we are a JFS	\$16,646.00		
Subtotal Personnel		\$16,646.00	\$0.00	\$0.00
Program (<i>non-personnel</i>) Expenses (<i>itemize</i>)				
Staff Training	Training to improve efficacy/efficiency/increase income	\$10,000.00		
Workflow Development	Streamline intake procedures and other functions. IT consultant needed	\$2,000.00		
Policies and procedures updates	Update policies and procedures to reflect results of work. Update manuals for accreditation purposes	\$1,500.00		
Subtotal Non-personnel		\$13,500.00	\$0.00	\$0.00
Capital Expenses				
	Equipment and furnishings			
	Other			
Subtotal Capital		\$0.00	\$0.00	\$0.00
Marketing Costs				
	Brochures, printed materials			
	Mailings			
	Other			
Subtotal Marketing		\$0.00	\$0.00	\$0.00
Infrastructure (<i>itemize</i>)				
Subtotal Administration Overhead		\$0.00	\$0.00	\$0.00
TOTAL EXPENSES		\$30,146.00	\$0.00	\$0.00
NET EXPENSES		\$30,146.00	\$0.00	\$0.00
AMOUNT REQUESTED FROM JCF		\$30,146.00		



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DRAFT Proposal

July 20, 2021

Submitted to:

Katie Hanley, CEO
Jewish Family Services of Greater Hartford
333 Bloomfield Avenue, Suite A
West Hartford, CT 06117

Thank you for the opportunity to submit this proposal for consideration. The Appendix includes my Bio.

This serves as a draft proposal, based on discussions and emails with Katie Hanley, CEO of JFS of Greater Hartford to review, evaluate and provide recommendations to enhance the Agency's clinical (i.e., Behavioral Health) program and services.

Introduction:

The benefits of a proposed review with subsequent recommendations include the possibility of leveraging increased efficiency, sustainability, and growth. The review should facilitate objectivity and build organizational capacity. The process proposed is designed to respond to increased demand for accountability, competition for funding and "customers", changing needs, and evolving environments (internally and externally).

All human service organizations are operating in turbulent environments, requiring that organizations pay attention to the **Volatile, Uncertain, Complex, and Ambiguous (VUCA¹)** aspects of organization operations at all levels. One way to combat or at the least the antidote to VUCA is termed VUCA-prime and suggests that human service organizational leadership focuses on **Vision, Understanding, Clarity, and Agility**.

The process by which leaders of organizations explore and create transparency, promote credibility, and demonstrate competence and integrity, and are committed to innovation, can make the difference between existing and becoming a viable, sustainable, and exceptional program (and organization).

This proposal outlines **THREE functional areas**; separate, yet related, **which will be examined in four phases**, within the *Scope of Work* (page 4).

¹ Elkington, R., Van Der Steege, M., Glick-Smith, J., & Moss Breen, J. (2017). *Visionary Leadership in a Turbulent World: Thriving in the new VUCA Context*. Emerald Publishing.

Area 1: Human Capital (Program staff)

PURPOSE: Explore the possibility for systematic, ongoing, and data-driven processes to identify the organization's clinical services human capital needs.

Developing such a process will allow the establishment and maintenance of a staff assessment system. It will facilitate the development of targeted staff enhancement and training. Having the “right” people in the “right” position with the “right” supports and training is critical to success. Talent assessment and development opportunities are necessary to strengthen the agency's clinical service and leadership capacity. One of the most crucial aspects of this review and evaluation is to identify the gaps in the philosophy of practice, which ultimately drives the professional decisions towards the greater potential for sustainability, effectiveness, and efficiency. The assessment of clinical staff's strengths and areas for development as part of a mitigation strategy strengthens the service's alignment with the organization's priorities.

Area 2: Clinical Program Evaluation/Analysis

PURPOSE: Evaluate the alignment of the clinical service with the Agency and Community priorities needs and recommend potential improvements.

Programs of any organization most successfully attain the highest performance and capacity when the services provided are aligned with its mission and community's needs. A data-driven strategy must be in place to ensure a strong culture of accountability. By developing an ongoing practice-focused system to specifically evaluate the clinical program and services within the agency and the community, results will yield a more effective and efficient way of delivering behavioral health services. The clinical program and service's relationship to other programs within the agency should also be reviewed.

Such a system should answer some questions as * Does the clinical program and services support other agency services? *Do other agency programs support the clinical program? *What resources (financial, structural, human, social, electronic, etc., are necessary to maintain a successful program? *What are the costs of the program and are they congruent with the Agency's short and long-term priorities? *Where are our services most exposed (risk management)? *What marketing strategies best serve our program? etc.

3. Knowledge Management

PURPOSE: Assess the current methods of knowledge Management and recommend potential improvements.

Knowledge Management is the capture and application of the collective “know-how” of members of the clinical team to advance its mission and specifically, outcomes. Internal knowledge management can significantly improve and strengthen program and service capabilities and performance. External knowledge management extends an organization's insights to establish successful collaborations, to further the agency's mission and program outcomes. A good *Knowledge Management* system should systematically collect enough data points to allow the agency to make timely changes to agency operations to further the Agency's objectives and prorate. Knowledge management can result in a competitive advantage.

Scope of Work

The purpose of the scope of work is to acquire sufficient data to understand the strengths and gaps of the Agency's clinical program and services and to make recommendations.

In the review of the clinical program and services, the proposal recommends incorporating the three specific areas delineated above, in **Four Phases**.

Each Phase is estimated to take 1 to 3 months depending on collaboration and co-creating next steps, as well as the availability, scheduling, and pace of access to needed information and key leadership/staff participants. As each phase is completed a brief report will be submitted, outlining the activities completed, the findings, and recommendations. The **final phase** will result in a comprehensive report, recommendations for improvement, an outline of steps to accomplish recommended goals, and the opportunity to discuss the report and recommendations with Agency identified stakeholders.

Phase 1: Review of at least the following documents: Organization Chart, understanding of staffing positions; credentials, professional experiences, etc. Demographic data of client base (EHRS), productivity data, program policy and procedures, any relevant PQI reports; any financial data such as cost and income per unit of service; program overhead, new clients per month, average treatment length, no show rates, any outcome data; description of the intake process. Description of supervisory process and training program and policies, etc.

- a. Interviews with relevant staff and stakeholders as mutually determined by Agency and Consultant
- b. Confidential survey of program staff and if the possible sample client base
- c. Conduct focus groups of program staff, management, other stakeholders

Phase 2: Facilitate the creation of the MacMillan Matrix² to assess the clinical program for sustainability, service competition, identification of duplication of resources, to maximize strengths, and increase partnerships and collaborations.

Phase 3: Facilitate an Appreciative Inquiry³ process. Determine participants, and *generative questions* for the Appreciative Inquiry process, which includes 4 phases/stages:

- a. The "Discovery" stage (identifies the best of what is, *appreciating*)
- b. The "Dream stage (explores what might be, *envisioning results*)
- c. The "Design" stage (explores what should be or the ideal, *co-constructing*) and
- d. The "Destiny" stage (explores how to empower, deployment/implementation, *sustaining*)

This process provides a blueprint for the improvement, enhancement of existing practices, and the development of innovative strategies.

² Example: https://www.icl.org/wp-content/uploads/woocommerce_uploads/2015/10/MacMillan-Matrix.pdf

³ Article: <https://positivepsychology.com/appreciative-inquiry/>

Phase 4: This final phase is designed to pull together the findings from all the phases and areas of the review into a Final Report. Action items include:

- Prepare Report and Recommendations
- Discuss draft with CEO, and others as requested by CEO
- Submit Final Report with recommendations to Agency
- Conduct final report discussion groups with designated stakeholders, as selected by Agency
- Discuss objectives and any future steps

Consulting Fees:

Fees will be invoiced upon completion of each phase, outlined in the *Scope of Work*, except for an initial retainer (TBD)

Phase 1: \$ 6,200

Phase 2: \$ 5,800

Phase 3: \$ 4,800

Phase 4: \$ 3,500

Total \$20,300

JFS Courtesy Discount @18% (\$3,654)

Total Project: \$16,646

Appendix

JENNI FRUMER, Ph.D., is the retired CEO of Alpert Jewish Family Service in West Palm Beach, Florida. She is licensed as a Clinical Social Worker and Mental Health Counselor and earned her Ph.D. in *Human Capital Management* from the College of Business at Bellevue University, NE. Dr. Frumer is currently the President of *Jenni Frumer & Associates LLC*, consultants for organizational management; specializing in organizational culture change, executive coaching, change management, leadership development, talent management, fund development, community outreach strategies, accreditation readiness, and program design and development. She is an expert consultant for *Global Leadership Initiatives*.

She has over 38 years in nonprofit leadership and established the standards for many programs, including immigration and resettlement, innovative centralized intake, domestic abuse outreach, community engagement, compensation models for behavioral health, Mental Health First Aid, intergenerational programming, enhanced companionship for older adults, residential and community services to adults with disabilities, and many other services, plus caring for trauma-exposed populations, including Holocaust Survivors.

Jenni is a graduate of both the Wexner Leadership Training program, the Alliance for Children & Families *Executive Leadership Institute* (ELI), at the University of Michigan. Dr. Frumer has a National Board *Certification in Geriatric Counseling*, a Certification in *Geriatric Care Management* has an *Aging Life Care Professional* certificate and is a former *Florida Registered Guardian*. She holds a certificate in *Visionary Leadership During Turbulent Times* from Ontario university and a certificate and *Leading Organizations and Change*, from MIT.

Dr. Frumer is an Adjunct Professor at Fordham University and Lynn University and has also been Adjunct faculty at Barry University and Creighton Universities, teaching courses in public administration, human resources, nonprofit leadership, macro social work, supervision, and staff development.

She was responsible for designing and implementing the Work/Family Employee Assistance Program (EAP) for more than 67 Fortune 100-500 companies, offering consultation and seminars on aging and family issues and referral services in 9 counties in southeast Florida to IBM, American Express, and other national and international companies.

Dr. Frumer has extensive experience as a Team Leader for the *National Council on Accreditation* (COA); site visits of other social service agencies and US Marine Corps installations, both domestically and internationally, and served on the Board of COA. She served on the New Age of Aging Leadership Advisory Committee; the American Society on Aging (ASA) membership and Aging Business and Finance committees. Jenni has experience working with family offices and businesses, facilitating sometimes difficult discussions around aging and end-of-life issues.

She has presented extensively both nationally and internationally on several topics related to non-profit administration, business initiatives, what motivates charitable giving to nonprofits, and cultural competence training in trauma and working with older adults and their families, including the unique needs of Holocaust survivors and the multi-generational transmission of trauma. She has trained small and large organizations on assessing for and implementing person-centered trauma-informed care processes. Dr. Frumer maintains a private practice, offering counseling to Holocaust Survivors and their 2nd (2G) and 3rd (3G) Generation family members.

She currently serves as the Director of the *NOW for Holocaust Survivors Initiatives* at MorseLife Health System and works with the *NEXT GENERATIONS of Holocaust Survivors* as the Director of Strategic Initiatives and serves on the Board of the *International Center of Multigenerational Legacies of Trauma*.

Dr. Frumer has written and published articles on geriatric social service systems, engaging Baby Boomers, peer-to-peer models of care, and community engagement models in the work of non-profits. She had a leadership role in developing the first online Patient Advocate program at the University of Miami and has expertise in helping older adults and their families through the aging process. Her area of research includes “*What motivates charitable giving to faith-based nonprofits human service organizations*”.

Dr. Frumer was born in Zimbabwe and grew up in South Africa until 1982 when she emigrated to the USA.

Investment Committee**May 5, 2021****Zoom call**

Call to order: 7:30 AM Adjournment: 8:30 AM

Presiding: Jay S. Spivak, Chair**Recording:** R. Morgan/K. Gonnerman**Present:** Brian S. Fierston, Gerry Goldberg, Joshua Gottfried, David Marks, Alan Mendelson, David Marks, David Roth, Robert Goldfarb, Gayle Temkin *ex-officio***Absent:** Dave Miller**Also Attending:** Michael Miller, Crewcial Partners; Kyle Marmelstein, Crewcial Partners; Rhona H. Morgan, VP Finance; Jacob Schreiber, President & CEO; Kathryn Gonnerman, VP Philanthropy, Maureen O'Connell, Marketing Director; Susie Lotreck, VP Operations & Donor Services, and Christine Kelly, Controller

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
Chair's Remarks	Mr. Spivak welcomed the committee , Mr. Miller and Mr. Marmelstein		
Approve minutes of the February 5, and March 23, 2021 meetings	The committee reviewed the minutes.	Upon motion duly made and seconded, the minutes were accepted and approved.	

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
<p>Review March 31, 2021 Investment Reports and Market Outlook</p>	<p>Mr. Miller briefed the committee on the Foundation's remarkable gains, noting that Crewcial is concerned about prospective return for endowments given the amount of speculative activity in the markets, and extreme valuations. He warned that the 10-year perspective does not look good, especially regarding the S&P 500 and bonds. The committee asked what alternatives exist for endowments, and Mr. Miller noted that heavy equity exposure, with bond diversification (like the Foundation's current portfolio) will likely be smarter bets. A discussion of the spending policy led to the recommendation to stay focused on the portfolio strategy rather than changing spending policy.</p> <p>Mr. Marmelstein reviewed performance by asset classes. He noted that the portfolio returns do not yet reflect private equity for Q4 2020 and Q1 2021, and these are likely to push performance numbers even higher. He explained causes for active manager success and underperformance.</p> <p>On discussion, the committee noted that investment-grade bonds were below the asset allocation target, leading to discussion and a motion to bring the allocation up to the lowest end of the scale. This decision allows more flexibility for future adjustments after the broader asset allocation discussion.</p>	<p>Upon motion duly made and seconded, the Committee voted unanimously to invest \$1 million from cash into Vanguard Bond Fund.</p>	<p>Immediately, act on motion and purchase \$1 million from Staff completed purchase 5/5/21 Vanguard Bond Fund.</p> <p>At the next meeting, consider increasing asset allocation to private equity. Staff to assess the 24-36 month liquidity needs and how much of the principal is subject to quick withdrawal (e.g., custodial funds, donor advised funds)</p>

Agenda/Issue	Discussion/Report	Action/Approval	Follow-Up
JLENS and Morningstar Update	Mr. Goldberg shared that he has offered to facilitate a dialogue between Morningstar and JLENS, but that a shareholder resolution presented by JLENS must be resolved first. In the mean-time Mr. Goldberg continues to discuss the issue with other investors – collaborative effort will be important if there is change needed.		
Cash Availability	Ms. Morgan reported that the Foundation is all set in terms of cash availability for the next 12 months.		
Future Meetings	<ul style="list-style-type: none">• August 5, 2021		

Respectfully submitted by

DocuSigned by:

Jay S Spivak

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Jay S. Spivak

Performance Summary

The Foundation's portfolio provided a 5.5% return for the quarter, underperforming its target benchmark return by 40 bps.

Some of the key points that affected the portfolio this quarter were as follows:

Jackson Square Partners – SMID Cap Growth – The Jackson Square SMID Cap Growth Fund outperformed its benchmark for the quarter. The performance was largely driven by stock selection, with healthcare as the largest contributor. A key contributor to the outperformance was Bio-Techne Corporation, which provides proteins and antibodies for medical research; the company performed well after reporting strong results for the first quarter, accelerating organic growth, and a growing end market. Another contributor was Stitch Fix, Inc; the personalized on-line shopping website reported strong earnings and guided ahead of consensus estimates.

Wellington International Contrarian Value – The Wellington International Contrarian Value Fund outperformed its benchmark in Q2. Favorable sector allocation (e.g., above-benchmark exposure to the energy sector and below-benchmark exposure to the utilities sector) continued to contribute to its performance. The Fund was further aided by stock selection in the industrials and communications sectors. In terms of individual positions, the biggest contributor this quarter was an off-benchmark allocation to Pacific Basin Shipping, a Hong Kong-based marine transportation services company. Shares of the company were boosted by solid Q1 results, led by a rise in demand for commodities and construction materials. An overweight position in Nokia was another notable contributor. The company's stock price jumped after it delivered surprisingly strong Q1 earnings fueled by 5G-related gains in its network infrastructure and mobile-networks businesses, as well as sales shifting toward high-margin 5G products.

Brown Capital International Small Company Fund - The Brown Capital International Small Company Fund outperformed its benchmark in Q2. Geographically, the portfolio's below-benchmark exposure to Japan largely contributed to its performance. The Fund was further aided by its stock selection in the healthcare sector. Two UK-based healthcare companies in the portfolio, Immunodiagnosics System and Ventura Group, received acquisition offers from strategic and financial investors. Another top performer this quarter was Evotec, a German contract research organization that provides early drug-discovery solutions. Shares of the company were buoyed by the management's discussion of its vision for 2025, which set a compound annual revenue growth target of 15% and an adjusted EBITDA margin target of at least 25%.

Elephant Long-Only Emerging Markets Fund – The Elephant Long-Only Emerging Markets Fund underperformed its benchmark in Q2 due to stock selection in India and the consumer discretionary sector. The most significant underperformer this quarter was Suofeiya Home Collection, a Chinese customized furniture manufacturer. The company's stock price was affected by disappointing Q1 results from the introduction of a new product line that requires significant upfront investment. Affle, an Indian ad-tech company, was another major detractor. Shares of the company were pressured by the sell-off from a foreign institutional investor who faced large redemptions.

Gobi Concentrated Fund – The Gobi Concentrated Fund outperformed its benchmark in Q2. Due to the portfolio's concentration, individual companies were significant determinants of overall performance. The biggest contributor this quarter was Facebook. The company's stock price was aided by its Q1 earnings, which suggested a 48% rise in revenue and 94% increase in net profit, mainly driven by a 30% year-over-year increase in the average price per ad and a 12% rise in ads delivered. Another top contributor was Google's parent, Alphabet. Shares of the company were boosted by strong Q1 earnings, which beat analyst estimates, as well as brokerage upgrades.

Performance Summary

Ampfield Holdings – Ampfield Holdings outperformed its benchmark in the second quarter. The portfolio had three main contributors to performance. One was Topicus.com, a pan-European provider of vertical market software and platforms, which was up approximately 17% in Q2. Ampfield received shares of Topicus.com after it was spun-out by Constellation Software (a current Ampfield holding). Goeasy, a non-prime consumer lender in Canada, was another contributor, up approximately 30% in Q2. Goeasey purchased LendCare, a private consumer financing company specializing in merchant services. LendCare is growing quickly and earning high returns on its equity. The third contributor was LGI Homes Inc., an entry-level homebuilder and developer engaged in the design, construction, and sale of new homes across the US, which is experiencing peak cyclical demand.

Total Managed Assets
Investment Performance and Asset Allocation Summary - Period Ending June 30, 2021
Net of Fees

Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	Periods Ending - June 30, 2021										Annualized	
					1 mon %	3 mon %	FYTD ¹ %	CYTD %	1 yr %	3 yr %	5 yr %	7 yr %	10 yr %	15 yr %		
Total Fund	168,925,930	100.0%			0.8	5.5	35.0	10.8	35.0	12.3	12.1	8.2	8.4	7.4		
Total Fund x/Private Equity	155,650,208				0.8	5.9	34.8	10.6	34.8	11.6	11.7	7.8	8.0	7.1		
Overall Market Benchmark ²					0.9	5.9	32.5	10.2	32.5	11.9	11.6	8.0	8.4	7.0		
CPI Plus 5%					1.3	3.6	10.7	6.3	10.7	7.9	7.8	7.2	7.1	7.2		
60% MSCI AC World / 40% Barclays Aggregate					1.1	5.2	22.2	6.6	22.2	11.2	10.1	7.4	7.5	6.7		
				% of Equity												
Equity Composite ³	115,751,260	68.5%		100.0%	1.3	7.1	44.9	12.5	44.9	14.9	15.5	10.5	10.8	8.5		
MSCI AC World Index					1.3	7.4	39.3	12.3	39.3	14.6	14.6	9.7	9.9	7.6		
Total Large Cap Composite	27,958,997	16.6%	15.0%	24.2%	1.8	9.2	47.2	18.4	47.2	20.1	19.6	15.0	15.5	11.4		
			(12.0 - 18.0)													
Large Cap Core	8,655,227	5.1%		7.5%	3.5	10.6	39.3	14.8	39.3	21.2	20.5	16.0	16.1	11.9		
Fidelity Contrafund - FCNTX - (2/94 -)	5,885,290	3.5%		5.1%	4.1	11.7	38.5	14.5	38.5	20.8	21.7	16.7	16.5	12.5		
Jlens Jewish Advocacy Strategy - (9/18 -)	2,769,937	1.6%		2.4%	2.2	8.4	40.2	15.4	40.2	NA	NA	NA	NA	NA		
S&P 500					2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7		
Large Cap Value	14,303,027	8.5%		12.4%	-0.5	7.5	52.4	22.7	52.4	14.7	15.8	11.4	13.1	8.8		
Dodge & Cox Stock - DODGX - (2/00 -)	9,277,434	5.5%		8.0%	-0.2	8.8	58.9	26.1	58.9	15.8	17.4	12.0	14.0	9.4		
Vanguard Value Index Admiral - VVIAX - (5/15 -)	5,025,593	3.0%		4.3%	-1.2	5.3	41.3	16.8	41.3	12.9	13.0	NA	NA	NA		
S&P 500					2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7		
Russell 1000 Value					-1.1	5.2	43.7	17.0	43.7	12.4	11.9	9.4	11.6	8.0		
Large Cap Growth	5,000,743	3.0%		4.3%	6.0	11.7	42.8	13.4	42.8	25.3	23.0	17.7	17.5	13.3		
Vanguard Growth Index Admiral - VIGAX - (5/02 -)	5,000,743	3.0%		4.3%	6.0	11.7	42.8	13.4	42.8	25.3	23.0	17.7	17.5	13.3		
S&P 500					2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7		
Russell 1000 Growth					6.3	11.9	42.5	13.0	42.5	25.1	23.7	18.6	17.9	13.5		
Total Mid Cap Composite	14,720,680	8.7%	8.0%	12.7%	1.4	6.5	44.4	12.6	44.4	16.1	15.6	12.0	12.6	10.4		
			(5.0 - 11.0)													
Mid Cap Core	5,776,651	3.4%		5.0%	1.8	7.5	46.9	15.5	46.9	16.5	15.7	12.2	13.1	NA		
Vanguard Index FDS Vanguard Mid - VO - (2/07 -)	5,776,651	3.4%		5.0%	1.8	7.5	46.9	15.5	46.9	16.5	15.7	12.2	13.1	NA		
Russell Mid Cap					1.5	7.5	49.8	16.2	49.8	16.4	15.6	12.0	13.2	10.5		
Mid Cap Value	4,004,162	2.4%		3.5%	-1.3	4.9	48.0	12.1	48.0	11.4	11.9	7.7	8.8	8.0		
Iridian Private Business Mid Cap - (9/15 -)	4,004,162	2.4%		3.5%	-1.3	4.9	48.0	12.1	48.0	11.4	11.9	NA	NA	NA		
Russell Mid Cap					1.5	7.5	49.8	16.2	49.8	16.4	15.6	12.0	13.2	10.5		
Russell Mid Cap Value					-1.2	5.7	53.1	19.5	53.1	11.9	11.8	9.3	11.7	9.1		
Mid Cap Growth	4,939,867	2.9%		4.3%	3.1	6.6	38.9	9.8	38.9	18.7	18.1	14.9	15.1	12.6		
T Rowe Price Mid Cap Growth - RPMGX - (9/00 -)	4,939,867	2.9%		4.3%	3.1	6.6	38.9	9.8	38.9	18.7	18.1	14.9	15.1	12.8		
Russell Mid Cap					1.5	7.5	49.8	16.2	49.8	16.4	15.6	12.0	13.2	10.5		
Russell Mid Cap Growth					6.8	11.1	43.8	10.4	43.8	22.4	20.5	15.4	15.1	12.1		
Total Small Cap Composite	16,782,871	9.9%	8.0%	14.5%	2.0	5.0	66.6	17.9	66.6	17.7	17.7	11.5	11.5	9.8		
			(5.0 - 11.0)													
Small Cap Value	9,109,933	5.4%		7.9%	-2.8	4.0	80.4	31.6	80.4	9.3	11.7	6.1	7.6	7.4		
DFA US Small Cap Value Port. Instl. - DFSVX - (5/19 -)	9,109,933	5.4%		7.9%	-2.8	4.0	80.4	31.6	80.4	NA	NA	NA	NA	NA		
Russell 2000					1.9	4.3	62.0	17.5	62.0	13.5	16.5	11.4	12.3	9.5		
Russell 2000 Value					-0.6	4.6	73.3	26.7	73.3	10.3	13.6	9.3	10.8	7.9		
Small Cap Growth	7,672,938	4.5%		6.6%	8.4	6.1	52.4	4.9	52.4	26.1	24.3	17.4	15.7	12.1		
Jackson Square SMID Cap Growth - DCGTX - (9/15 -)	7,672,938	4.5%		6.6%	8.4	6.1	52.4	4.9	52.4	26.1	24.1	NA	NA	NA		
Russell 2000					1.9	4.3	62.0	17.5	62.0	13.5	16.5	11.4	12.3	9.5		
Russell 2000 Growth					4.7	3.9	51.4	9.0	51.4	15.9	18.8	13.1	13.5	10.9		

Total Managed Assets
Investment Performance and Asset Allocation Summary - Period Ending June 30, 2021
Net of Fees

									Periods Ending - June 30, 2021				Annualized		
Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	1 mon %	3 mon %	FYTD ¹ %	CYTD %	1 yr %	3 yr %	5 yr %	7 yr %	10 yr %	15 yr %	
Total International Composite	32,187,730	19.1%		27.8%	-1.4	5.0	39.9	9.9	39.9	9.2	11.1	5.8	6.1	4.8	
			(14.0 - 20.0)												
International Core	8,929,400	5.3%		7.7%	-1.1	5.7	35.8	9.9	35.8	9.2	10.8	5.7	5.7	4.2	
Vanguard Developed Markets Index Admiral - VTMGX - (5/12 -)	8,929,400	5.3%		7.7%	-1.1	5.7	35.8	9.9	35.8	9.1	10.8	5.6	NA	NA	
MSCI EAFE					-1.1	5.2	32.4	8.8	32.4	8.3	10.3	5.0	5.9	4.4	
International Value	15,430,611	9.1%		13.3%	-2.5	4.0	41.1	13.2	41.1	4.9	8.6	4.0	5.7	4.7	
Sanderson International Value - (9/15 -)	7,064,529	4.2%		6.1%	-2.4	2.9	35.2	8.1	35.2	4.6	7.7	NA	NA	NA	
Wellington International Contrarian Value - (5/15 -)	8,366,082	5.0%		7.2%	-2.5	5.0	46.5	17.9	46.5	4.4	9.7	NA	NA	NA	
MSCI EAFE					-1.1	5.2	32.4	8.8	32.4	8.3	10.3	5.0	5.9	4.4	
MSCI EAFE Value					-2.3	3.0	33.5	10.7	33.5	3.8	7.8	1.9	3.9	2.7	
International Growth	7,827,719	4.6%		6.8%	0.6	8.2	41.2	5.9	41.2	NA	NA	NA	NA	NA	
Brown International Small Company Instl. - BCSFX - (11/18 -)	7,827,719	4.6%		6.8%	0.6	8.2	41.2	5.9	41.2	NA	NA	NA	NA	NA	
MSCI EAFE					-1.1	5.2	32.4	8.8	32.4	8.3	10.3	5.0	5.9	4.4	
MSCI EAFE Growth					0.0	7.4	31.0	6.8	31.0	12.4	12.5	7.8	7.8	6.0	
Emerging Markets	8,730,512	5.2%	5.0%	7.5%	-0.8	4.2	44.6	10.9	44.6	9.4	10.7	4.2	3.0	NA	
DFA Emerging Markets - DFEVX - (10/10-)	4,549,395	2.7%	(2.0 - 8.0)	3.9%	0.2	6.9	46.8	15.8	46.8	7.4	10.8	4.3	2.2	NA	
Elephant Long Only Emerging Markets Fund (9/19 -)	2,087,407	1.2%		1.8%	-0.4	2.6	41.6	8.8	41.6	NA	NA	NA	NA	NA	
Himalaya Capital Investors (9/19 -)	2,093,710	1.2%		1.8%	-3.3	0.4	41.5	3.3	41.5	NA	NA	NA	NA	NA	
MSCI Emerging					0.2	5.0	40.9	7.4	40.9	11.3	13.0	6.4	4.3	6.6	
MSCI China					0.1	2.3	27.4	1.8	27.4	10.4	16.6	10.8	7.7	10.3	
Special Opportunities	15,370,469	9.1%	10.0%	13.3%	3.6	9.0	51.2	12.5	51.2	15.8	NA	NA	NA	NA	
MSCI ACWI					1.3	7.4	39.3	12.3	39.3	14.6	14.6	9.7	9.9	7.6	
Gobi Concentrated Fund - (8/17 -)	4,322,140	2.6%	(7.0 - 13.0)		1.5	11.7	46.2	16.3	46.2	14.1	NA	NA	NA	NA	
MSCI ACWI Value Index					-1.3	4.8	38.4	14.1	38.4	8.4	9.8	5.6	7.0	5.3	
MSCI World Index					1.5	7.7	39.0	13.0	39.0	15.0	14.8	10.2	10.7	7.8	
Tybourne Long Opportunities Fund - (9/17 -)	8,030,410	4.8%			5.3	6.9	48.4	6.1	48.4	15.2	NA	NA	NA	NA	
MSCI ACWI Growth Index					4.0	10.0	39.7	10.3	39.7	20.4	19.2	13.7	12.7	9.8	
65% MSCI Asia / 35% S&P 500					0.7	4.4	36.5	8.3	36.5	13.3	14.6	10.3	10.0	7.5	
Ampfield (9/20 -)	3,017,919	1.8%			2.2	10.9	NA	26.8	NA	NA	NA	NA	NA	NA	
MSCI ACWI					1.3	7.4	39.3	12.3	39.3	14.6	14.6	9.7	9.9	7.6	

Total Managed Assets
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Net of Fees

	Periods Ending - June 30, 2021											Annualized		
Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	1 mon %	3 mon %	FYTD ¹ %	CYTD %	1 yr %	3 yr %	5 yr %	7 yr %	10 yr %	15 yr %
				% of Alternatives										
Alternative Composite	20,734,724	12.3%		100.0%	0.8	4.8	37.4	14.2	37.4	12.8	11.1	6.1	5.8	7.0
Private Equity*	13,275,722	7.9%	8.0%	64.0%	0.0	0.0	32.5	9.9	32.5	19.8	18.2	15.0	14.1	12.3
S&P 500			(3.0 - 13.0)		2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7
S&P 500 +5%					2.8	9.9	47.8	18.1	47.8	24.7	23.6	19.9	20.7	16.4
Cambridge Associates Private Equity - Actual					0.0	0.0	26.5	0.0	26.5	13.4	14.6	11.9	12.2	11.6
Buyout/Growth	5,313,528	3.1%			0.0	0.0	13.6	2.1	13.6	11.4	15.1	14.6	14.1	12.8
S&P 500					2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7
Cambridge Associates Buyout - Actual					0.0	0.0	25.1	0.0	25.1	13.6	15.5	13.3	13.2	12.3
			Commitment	Remaining Commitment		YTD - Capital Calls	YTD - Distributions	IRR	IRR as of	Valuation As Of*	Cumulative Distributions			
Aberdeen Private Equity III (2/06 -)	123,536	0.1%	\$1,000,000	\$0	\$0	\$54,575	9.8%	12/31/2020	12/31/2020	\$1,656,925				
Aberdeen International (2/06 -)	210,231	0.1%	\$500,000	\$10,000	\$0	\$28,305	12.1%	12/31/2020	12/31/2020	\$887,158				
Aberdeen Private Equity V (12/12 -)	605,678	0.4%	\$750,000	\$0	\$0	\$190,566	16.9%	12/31/2020	12/31/2020	\$740,395				
Aberdeen Private Equity VI (5/15 -)	1,973,711	1.2%	\$2,000,000	\$200,000	\$0	\$322,683	19.9%	12/31/2020	12/31/2020	\$1,127,368				
Eightfold Opportunity III (2/18 -)	584,253	0.3%	\$1,000,000	\$275,722	\$0	\$93,606	3.4%	3/31/2021	3/31/2021	\$270,901				
747 Stuyvesant VI Parallel Fund (5/18 -)	1,324,515	0.8%	\$2,000,000	\$1,000,000	\$200,000	\$0	NM	3/31/2021	3/31/2021	\$0				
747 Stuyvesant VII Parallel Fund (3/21 -)	75,000	0.0%	\$1,500,000	\$1,425,000	\$75,000	\$0	NM	NA	NA	\$0				
Eightfold Opportunity IV (3/21 -)	416,604	0.2%	\$1,000,000	\$622,591	\$389,996	\$0	NM	3/31/2021	3/31/2021	\$0				
Total Buyout/Growth			\$9,750,000	\$3,533,313	\$664,996	\$689,735								\$4,682,748
Venture Capital	7,962,194	4.7%			0.0	0.0	49.3	16.1	49.3	29.8	21.6	15.8	15.5	14.8
S&P 500					2.3	8.5	40.8	15.3	40.8	18.7	17.6	14.1	14.8	10.7
Cambridge Associates Venture Capital - Actual					0.0	0.0	39.4	0.0	39.4	23.9	20.1	18.0	16.8	13.5
			Commitment	Remaining Commitment		YTD - Capital Calls	YTD - Distributions	IRR	IRR as of	Valuation As Of*	Cumulative Distributions			
CommonFund Venture Partners VI (3/02 -)	122,483	0.1%	\$1,225,000	\$33,628	\$0	\$20,602	8.3%	12/31/2020	3/31/2021	\$1,927,421				
Aberdeen Venture Partners VI (2/06 -)	454,050	0.3%	\$1,000,000	\$20,000	\$0	\$84,345	10.8%	12/31/2020	12/31/2020	\$1,592,072				
Weathergag Venture Capital III (12/14 -)	3,066,869	1.8%	\$1,500,000	\$300,000	\$45,000	\$249,361	24.4%	3/31/2021	3/31/2021	\$300,192				
Weathergag Venture Capital IV (6/16 -)	3,140,066	1.9%	\$2,000,000	\$640,000	\$0	\$0	35.0%	3/31/2021	3/31/2021	\$0				
Accolade Partners VII (7/19 -)	912,494	0.5%	\$1,500,000	\$839,078	\$180,000	\$0	NM	3/31/2021	3/31/2021	\$0				
Accolade Partners VIII - (1/21 -)	116,232	0.1%	\$1,000,000	\$912,500	\$87,500	\$0	NM	3/31/2021	3/31/2021	\$0				
H Barton Venture Select IV - (5/31 -)	150,000	0.1%	\$1,500,000	\$1,350,000	\$150,000	\$0	NM	NA	NA	\$0				
Total Venture Capital			\$9,725,000	\$4,095,206	\$462,500	\$354,307								\$3,819,685
Real Assets Composite	7,459,001	4.4%	5.0%	36.0%	2.3	14.7	47.1	22.5	47.1	4.8	4.2	-3.9	-3.2	NA
DFA Commodity Strategy Instl. - DCMSX - (1/18 -)	7,459,001	4.4%	(2.0 - 8.0)	36.0%	2.3	14.7	47.0	22.5	47.0	4.8	NA	NA	NA	NA
Bloomberg Commodity Index					1.9	13.3	45.6	21.1	45.6	3.9	2.4	-4.1	-4.4	-3.0
S&P North American Natural Resources Index					0.3	11.1	45.9	32.7	45.9	-1.8	2.0	-3.6	-0.6	2.0

Total Managed Assets
Investment Performance and Asset Allocation Summary - Period Ending June 30, 2021
Net of Fees

	Periods Ending - June 30, 2021											Annualized		
Name	Assets Market Value	% of Total Fund	Target Weights/Ranges	% of Equity/ Alts./Fixed	1 mon %	3 mon %	FYTD ¹ %	CYTD %	1 yr %	3 yr %	5 yr %	7 yr %	10 yr %	15 yr %
				% of Fixed										
Fixed Income Composite	25,501,296	15.1%		100.0%	0.2	1.6	3.3	-0.6	3.3	4.7	3.1	2.9	3.4	4.8
Investment Grade Fixed Income	11,483,590	6.8%	10.0%	45.0%										
Vanguard Total Bond Market Index Admiral - VBT LX - (8/01 -)	7,337,727	4.3%	(7.0 - 13.0)	28.8%	0.8	2.0	-0.4	-1.7	-0.4	5.3	2.9	3.2	3.3	4.3
Income Research & Management (8/14 -)	3,429,133	2.0%		13.4%	0.9	1.8	0.8	-1.3	0.8	6.1	3.5	NA	NA	NA
Barclays Capital Aggregate Bond Index					0.7	1.8	-0.3	-1.6	-0.3	5.3	3.0	3.3	3.4	4.4
Barclays Capital Intermediate Credit					0.3	1.6	2.2	-0.5	2.2	5.8	3.6	3.5	3.8	4.8
Ladder Bonds ⁴	716,729	0.4%		2.8%	0.0	0.1	0.0	0.0	0.0	0.9	1.0	1.1	1.3	2.9
Barclays Capital Intermediate Credit					0.3	1.6	2.2	-0.5	2.2	5.8	3.6	3.5	3.8	4.8
High Yield Fixed Income	4,132,882	2.4%	3.0%	16.2%										
OHA Diversified Credit Strategies Fund (Offshore) (10/14 -)	4,132,882	2.4%	(1.0 - 5.0)	16.2%	0.8	1.9	13.1	4.0	13.1	6.0	6.2	NA	NA	NA
50% CSFB Lev. Loan/50% Barclays Corp. HY					0.9	2.1	13.5	3.6	13.5	5.9	6.3	4.8	5.6	6.0
Merrill High Yield					1.4	2.8	15.5	3.6	15.5	7.1	7.3	5.3	6.5	7.3
Global Fixed Income	5,454,176	3.2%	4.0%	21.4%										
Colchester Global Bond Fund (3/10 -)	5,454,176	3.2%	(1.0 - 7.0)	21.4%	-1.5	1.1	3.9	-5.0	3.9	4.2	2.4	1.5	2.5	NA
FTSE World Gvt Bond Index					-1.1	1.0	0.8	-4.8	0.8	3.6	1.7	1.4	1.4	3.4
TIPS Fixed Income	4,430,648	2.6%	3.0%	17.4%										
Vanguard TIPS (6/10 -)	4,430,648	2.6%	(0.0 - 6.0)	17.4%	0.7	3.1	6.5	1.7	6.5	6.4	4.0	3.2	3.3	NA
Barclays Capital US TIPS					0.6	3.2	6.5	1.7	6.5	6.5	4.2	3.3	3.4	4.6
Cash	6,938,651	4.1%	2.0%											
Corporate Cash	4,733,070	2.8%												
New Fidelity Cash Account	1,579,990	0.9%												
Citizen Bank Cash ⁴	625,591	0.4%			0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	

1 - Fiscal Year ends June 30th.

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

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

4 - Preliminary based on manager's estimated return

* Market Value includes the latest capital account statement value, including any adjustments for Capital Calls and Distributions

Investment advisory services are offered through Crewcial Partners, LLC, a Securities and Exchange Commission Registered Investment Advisor. Values are calculated as of the date of the report. We believe the sources of our information, which may come from third-party service providers, to be reliable; however, the accuracy and completeness of the information is not guaranteed.

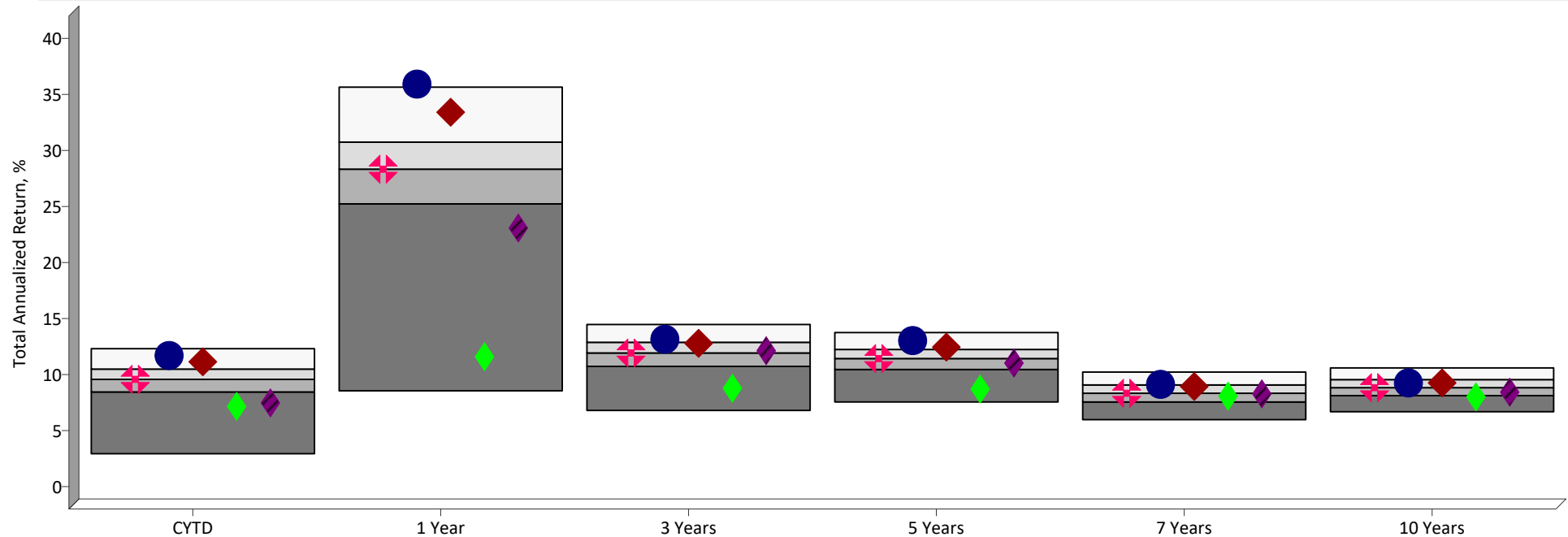
Data reflected within this report may reflect data held at various Custodians and Managers, and may not be covered under SIPC. Certain other reported entities may be SIPC members that provide coverage for assets held there. You should contact your financial representative, or the other entity, or refer to the other entity's statement, regarding SIPC coverage. Assets reflected on this report are not held at the Firm on your behalf, but at the Custodian.

Performance data quoted represents past performance and does not guarantee future results. The investment return and principal of an investment will fluctuate so that an investor's shares when redeemed may be worth more or less than original cost. The values represented in this report may not reflect the true original cost of your initial investment. Performance returns for time periods longer than 365 days have been annualized.

The figures do not represent potential market conditions, but do reflect the deduction of advisory fees. The client's return will be reduced by the advisory fees and any other expenses it may incur in the management of the advisory account. The advisory fees for Crewcial Partners, LLC, are disclosed in the Form ADV Part 2A Disclosure Brochure.

Jewish Community Foundation of Greater Hartford

June 30, 2021

Performance Evaluation**Benchmark**
60% MSCI ACW/40% Barc Agg**Universe**
Invest Metrics: All E&F**Invest Metrics Endowment & Foundation Universe: Trailing Performance vs. Peers - All Participants - 06/30/2021**

5th to 25th Percentile	25th to Median	Median to 75th Percentile	75th to 95th Percentile
Invest Metrics: All E&F Median			
Total Fund	Overall Market Benchmark	CPI +5%	60% MSCI ACW/40% Barc Agg

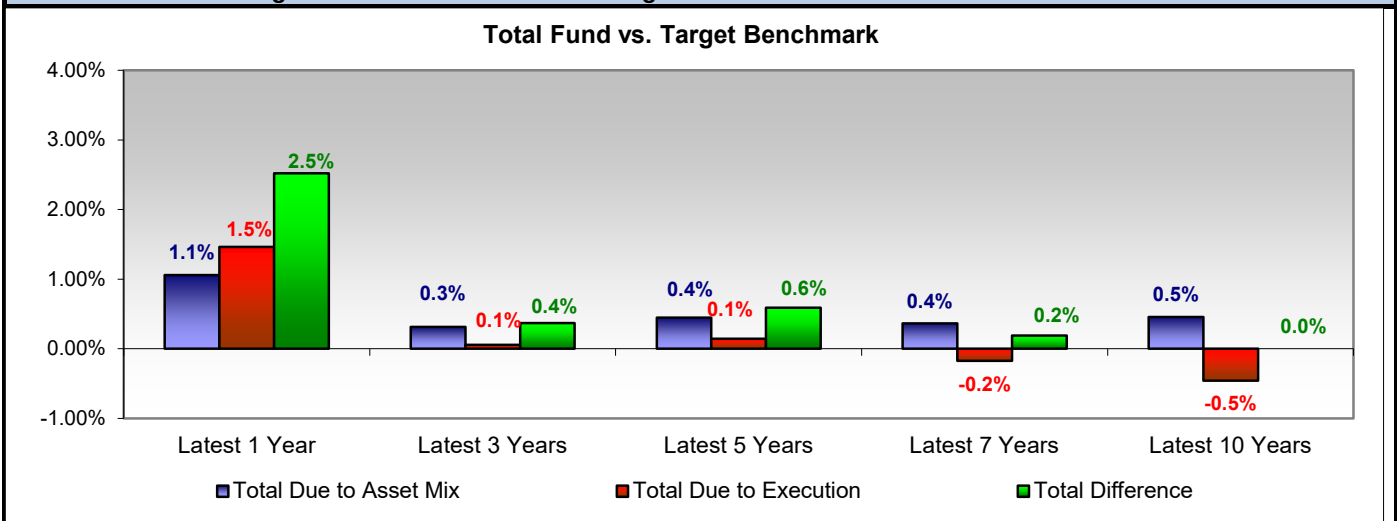
Annualized Performance to Date: Ending Jun-21	CYTD	1 Year	3 Years	5 Years	7 Years	10 Years
Total Fund	10.8	35.0	12.3	12.1	8.2	8.4
Overall Market Benchmark	10.2	32.5	11.9	11.6	8.0	8.4
CPI +5%	6.3	10.7	7.9	7.8	7.2	7.1
60% MSCI ACW/40% Barc Agg	6.6	22.2	11.2	10.1	7.4	7.5
Invest Metrics: All E&F Median	8.7	27.4	11.0	10.5	7.4	7.9
Invest Metrics: All E&F Size	584	573	530	478	424	328

Percentile Rank to Date: Ending Jun-21	CYTD	1 Year	3 Years	5 Years	7 Years	10 Years
Total Fund	8	4	19	13	23	33
Overall Market Benchmark	15	10	27	22	30	33
CPI +5%	86	94	91	92	60	77
60% MSCI ACW/40% Barc Agg	84	84	45	62	52	64
Invest Metrics: All E&F Average	60	62	57	56	51	52
Invest Metrics: All E&F Size	584	573	530	478	424	328

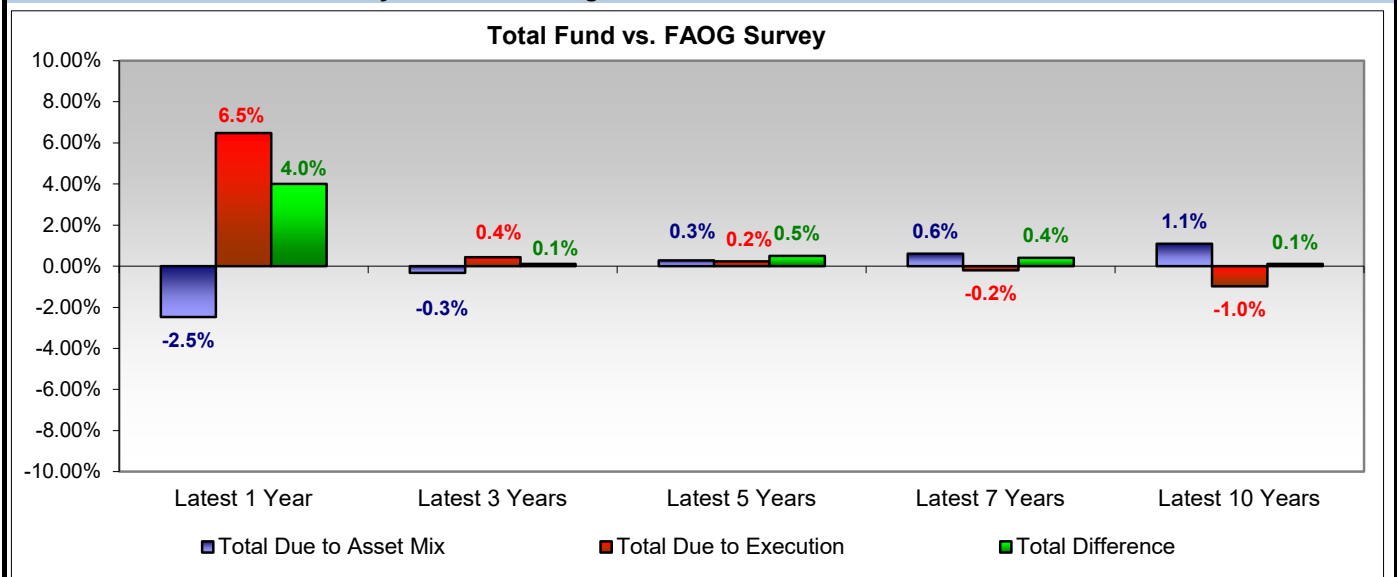
Asset Allocation Comparison - Foundation Portfolio & Target Weights as of 6/30/2021

	Jewish CF	Target Benchmark	Q1-2021 FAOG Survey
Large Capitalization Equity	16.6%	15.0%	26.6%
Mid Capitalization Equity	8.7%	8.0%	3.4%
Small Capitalization Equity	9.9%	8.0%	4.2%
International Developed Equity	19.1%	19.0%	19.0%
International Emerging Equity	5.2%	5.0%	6.3%
Special Opportunities	9.1%	10.0%	0.0%
Total Equities	68.6%	65.0%	59.5%
Aggregate Bonds	9.4%	13.0%	13.5%
High Yield Bonds	2.4%	3.0%	1.5%
Non-US Bonds	3.2%	4.0%	2.1%
Cash	4.1%	2.0%	2.6%
Total Fixed Income/Cash	19.1%	22.0%	19.7%
Hedge Funds	0.0%	0.0%	10.7%
Private Equity	7.8%	8.0%	5.2%
Real Estate	0.0%	0.0%	2.1%
Other (Commodities, Timber, Energy,...)	4.4%	5.0%	2.8%
Total Alternative Assets	12.2%	13.0%	20.8%

Attribution Versus Target Benchmark - Periods Ending 6/30/2021



Attribution Versus FAOG Survey - Periods Ending 3/31/2021



Cash Availability Summary July 29, 2021

CASH and CASH EQUIVALENT		3 months	6 months	9 months	12 months	Total	Outstanding Subscription	Not Covered in Projections
Fidelity Fixed & Equity Portfolio cash # X41-177717-6/30/2021		5,885,290	-	-	-	5,885,290		
Fidelity USA - Cash Reserves #656-367572 -6/30/2021		1,581,228	-	-	-	1,581,228		
Fidelity USA - Money Market Fund #645-698184 -6/30/2021		390,776	-	-	-	390,776		
Citizens bank Commercial Checking # 2231942822 -6/30/2021		364,301	-	-	-	364,301		
Fidelity Deposits/maturities/redemptions (since 6/30/2021)		501,500	-	-	-	501,500		
Other Deposits (projected gifts)		-	-	-	-	-		
Cash from Liquidations / Redemptions		-	-	-	-	-		
Interest/Dividend Receivable through (6/30/2021)		60,609	-	-	-	60,609		
Outstanding Checks through 3/31/2021)		(88,743)	-	-	-	(88,743)		
Checks Written (through 7/27/2021)		(321,591)	-	-	-	(321,591)		
Rapid Relief Recovery Fund Grants		(32,289)	(32,250)	(32,250)	(32,250)	(129,039)		
Bonds Maturing		-	-	40,000	-	40,000		
Alternative Distributions		100,000	100,000	100,000	100,000	400,000		
Subtotal		8,441,081	67,750	107,750	67,750	8,684,331		
ESTIMATED PAYABLES								
Cemetery Funds		(15,500)	(15,500)	(15,500)	(15,500)	(62,000)		
Custodial Funds Distributions		(165,000)	(165,000)	(165,000)	(165,000)	(660,000)		
Donor Advisor Fund Grants & Unrestricted Fund Grants		(570,000)	(570,000)	(570,000)	(570,000)	(2,280,000)		
Designated Fund Grants		(175,000)	(725,000)	(225,000)	(177,000)	(1,302,000)		
Operating Expenses (including capital expenses)		(415,000)	(435,000)	(435,000)	(435,000)	(1,720,000)		
Commonfund Commitment		(15,000)	(15,000)	(15,000)	(15,000)	(60,000)	94,898	34,898
Flagg Capital Commitment		(15,000)	(15,000)	(15,000)	(15,000)	(60,000)	65,888	5,888
Weathergag Venture Capital III & IV		(75,000)	(75,000)	(75,000)	(75,000)	(300,000)	905,000	605,000
747 Stuyvesant VI Parallel Fund L.P.		(100,000)	(100,000)	(100,000)	(100,000)	(400,000)	1,125,000	725,000
Accolade Partners VII, L.P.		(75,000)	(75,000)	(75,000)	(75,000)	(300,000)	840,000	540,000
Accolade Partners VIII, L.P.		(75,000)	(75,000)	(75,000)	(75,000)	(300,000)	912,500	612,500
Eightfold Opportunities Feeder Fund III		(65,000)	(54,263)	-	-	(119,263)	119,263	-
Subtotal		(1,760,500)	(1,940,500)	(1,765,500)	(1,392,500)	(6,859,000)	4,062,549	2,523,286
Operating Cash Reserve		(1,000,000)	-	-	-	(1,000,000)		
Cash Carryforward			5,680,581	3,807,831	2,150,081			
TOTAL CASH AVAILABLE		5,680,581	3,807,831	2,150,081	825,331	825,331		
BOND MATURITIES	Coupon	3 months	6 months	9 months	12 months	Total		
ISRAEL ST \$BD 7TH JUBILEE 3.95%, 4/1/2022	3.950			40,000		40,000		
ISRAEL ST \$BD 7TH JUBILEE 3.95%, 10/1/2022	2.750					550,000		
ISRAEL ST SER 11TH JUBILEE 0.70000% 07/01/2023 BOND	0.700					150,000		
ISRAEL ST SER 11TH JUBILEE 1.51000% 07/01/2026 BOND	1.510					150,000		
ISRAEL ST 11TH SERIES JUBILEE 8 4.36% 2/1/2024	4.360					25,000		
ISRAEL ST 11TH SERIES JUBILEE 5 3.11% 6/1/2024	3.110					100,000		
Subtotal		-	-	40,000	-	1,015,000		

Jewish Community Foundation of Greater Hartford, Inc.
 Total Pooled Invested Assets
 Summary of Investment Activities
 7/1/2020 thru 6/30/2021

Description	30-Sep-20	31-Dec-20	31-Mar-21	30-Jun-21	FYTD 2020 30-Jun-21	12 months Ending 30-Jun-21
Period Beginning Balance	125,432,050.92	131,346,099.88	148,159,192.19	157,485,543.29	125,432,050.92	125,432,050.92
<u>Receipts</u>						
Investment Income:						
Dividends	259,695.48	398,433.93	227,162.54	356,049.87	1,241,341.82	1,241,341.82
Interest	30,251.00	28,337.65	70,308.48	49,174.24	178,071.37	178,071.37
Accrued Interest Receivable	6,706.65	831.08	5,769.99	(11,499.03)	1,808.69	1,808.69
Total Income	296,653.13	427,602.66	303,241.01	393,725.08	1,421,221.88	1,421,221.88
Gains / Losses:						
Realized Gains / Losses	460,558.31	2,852,223.98	576,518.45	2,664,976.48	6,554,277.22	6,554,277.22
Unrealized Gains / Losses	7,019,284.33	13,467,123.47	7,715,194.78	8,328,754.64	36,530,357.22	36,530,357.22
Total Gains / Losses	7,479,842.64	16,319,347.45	8,291,713.23	10,993,731.12	43,084,634.44	43,084,634.44
Transfers In:						
Contributions/Redemptions/Princ. Pymts	762,964.13	1,054,249.46	3,697,001.61	1,179,997.46	6,694,212.66	6,694,212.66
Security Purchases including Israeli Bonds	348,530.30	511,486.87	320,495.81	512,654.29	1,693,167.27	1,693,167.27
From Other Accounts	5,942,757.79	13,026,516.55	1,001,693.43	3,523,029.07	23,493,996.84	23,493,996.84
Total Transfers In	7,054,252.22	14,592,252.88	5,019,190.85	5,215,680.82	31,881,376.77	31,881,376.77
<u>Disbursements</u>						
Administrative Expenses:						
Custodian Fee						
Investment Manager Fee	(72,779.03)	(56,038.49)	(77,708.57)	(84,239.51)	(290,765.60)	(290,765.60)
Other Fees	(137.01)	(250.63)	(249.81)	(121.55)	(759.00)	(759.00)
Total Disbursements	(72,916.04)	(56,289.12)	(77,958.38)	(84,361.06)	(291,524.60)	(291,524.60)
Transfers Out:						
Cash	(2,901,025.20)	(1,443,305.01)	(3,208,142.18)	(2,089,578.34)	(9,642,050.73)	(9,642,050.73)
To Other Accounts	(5,942,757.79)	(13,026,516.55)	(1,001,693.43)	(3,523,029.07)	(23,493,996.84)	(23,493,996.84)
Total Transfers Out	(8,843,782.99)	(14,469,821.56)	(4,209,835.61)	(5,612,607.41)	(33,136,047.57)	(33,136,047.57)
Ending Balance	131,346,099.88	# 148,159,192.19	157,485,543.29	168,391,711.84	168,391,711.84	168,391,711.84

Trading Activities
4/1/2021 through 6/30/2021

Transaction Category Name	Asset Type	Trade Date	Contractual Settlement Date	PAR / SHARES	Transaction Description	Cost Basis	Settlement Amount	Realized Gain /(Loss)
CALLS	ALTERNATIVES							
		4/12/2021	4/12/2021		ACCOLADE PARTNERS VII L.P.	90,000.00	90,000.00	
		4/21/2021	4/21/2021		747 STUYVESANT VI	200,000.00	200,000.00	
		5/3/2021	5/3/2021		EIGHTFOLD OPPORTUNITY FEEDER FUND IV	124,322.88	124,322.88	
		5/20/2021	5/20/2021		H. BARTON VENT SELT IV	150,000.00	150,000.00	
		6/17/2021	6/17/2021		EIGHTFOLD OPPORTUNITY FEEDER FUND IV	62,161.44	62,161.44	
		6/17/2021	6/17/2021		STATE OF ISRAEL BONDS -COMPUTERSHARE INC	300,000.00	300,000.00	
TOTAL CALLS						926,484.32	926,484.32	
REDEMPTIONS			6/1/2021		ISRAEL ST IITH SERIES JUBILEE 2.7700%	100,000.00	100,000.00	
			6/1/2021		ISRAEL ST SER ELEVENTH JUBILEE 3 .2300%	200,000.00	200,000.00	
						300,000.00	300,000.00	
PURCHASES	BOND	6/17/2021	7/1/2021		ISRAEL ST SER IITH JUBILEE 1.5100% 7/1/2026	150,000.00	150,000.00	
		6/17/2021	7/1/2021		ISRAEL ST SER IITH JUBILEE 0.7000% 7/1/2023	150,000.00	150,000.00	
						300,000.00	300,000.00	
	MUTUAL FUND		5/5/2021		VANGUARD TOTAL BOND MARKET INDEX ADMIRAL	1,000,000.00	1,000,000.00	

Make
Your Giving
Personal
Powerful
Eternal



Who
We Are

Since 1972, we have been unlocking the transformative power of **personal** and collective philanthropy to solve problems, strengthen community organizations, and provide permanent support for our Jewish community.



What
We Do

We strengthen and protect Greater Hartford’s Jewish community by growing a permanent pool of charitable dollars provided by generous donors who are committed to ensuring a vibrant and **powerful** Jewish community in perpetuity.



Why
We Do It

We believe in the power of each individual to make a difference and that together we can change our world. Foundation endowments are the way donors realize this vision and foster the **eternal** vibrancy of the Jewish community.



How
We Do It

Guided by Jewish values, we assist donors in structuring charitable gifts, building legacies, facilitating individual and family giving and distributing grants to a broad range of programs and institutions.



Why Partner
With Us?

When you partner with us, you join a community of generous, thoughtful donors who are strengthening the local Jewish community and creating a ripple effect for *tikkun olam*.

How to
Partner With Us >



Jewish Community Forever

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

Personal Service

We know our donors and their families. You will always speak with people who care about you and become your life-long partners with the Jewish Community Foundation.

Jewish Expertise

Your giving experience will be guided by professionals who understand the changing needs of Greater Hartford’s Jewish community and enjoy trusted relationships with leaders at local and national Jewish organizations.

Investment Expertise

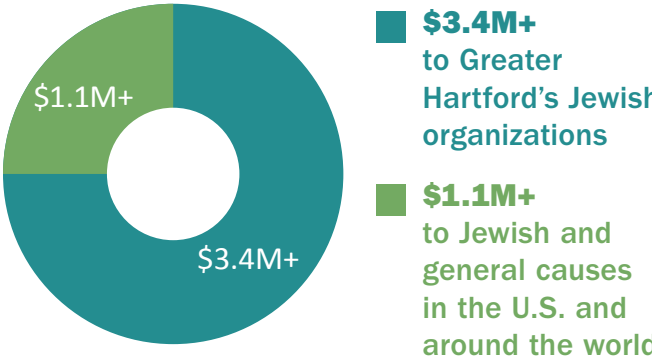
Your charitable assets are managed by investment professionals in a diversified portfolio that supports your charitable giving while growing your fund.

Investing in Our Community

Unlike commercial institutions, we invest our fees back into Greater Hartford’s Jewish community through grants, free consulting services, and community-building programs.

By the Numbers FY ’21

\$160M in managed assets
1,400 funds
\$4.6M granted



Flexible Giving Opportunities

Community Action Funds

These unrestricted funds support innovation, capacity-building, emergency needs and long-term solutions to challenges facing the community. Your gifts enable the Foundation to award grants where they are most needed.

Donor Advised Funds

DAFs are the most flexible way to support your favorite causes as you can recommend grants to organizations how and when you want. They are a great way to involve your family in a meaningful giving experience and receive immediate tax benefits*.

*This information should not be construed as legal, tax, or financial advice.

Designated Funds

These endowment funds support your favorite organization or charitable cause, and provide a regular stream of income that can be counted on every year.

Scholarship Funds

Provide financial assistance to students in the pursuit of their educational goals and learning experiences.

Legacy Funds

Create a future gift to the Jewish community through your will, trust, IRA, life insurance or charitable gift annuity. Pass on your values to your family and loved ones, and leave a lasting impact on the community.

The Foundation is currently partnering with 14 local agencies in a four-year after lifetime giving opportunity — the Harold Grinspoon LIFE & LEGACY program — to endow the future of our Jewish community.

Collective Funds and Giving Circles

Make decisions as a group about funding choices. Pool your resources with others, learn about critical community needs and decide where charitable dollars will have the greatest impact.

We’re here to help you explore and achieve your giving goals.

To schedule a personal discussion, please contact:

Kathryn Gonnerman
Vice President of Philanthropy
860.523.7460 or
email kgonnerman@jcfhartford.org



Community Grants Budget - Projected
July 1, 2020-June 30, 2022
(as of 7/1/2021)

	7/1/21-6/30/22 Projected Amount	Changes Year to Date	Revised Projection
Amount Available for Grants under Spending Policy¹	\$1,070,436.00		\$1,070,436.00
Plus: Over/Unexpended prior years' spendable amount			\$0.00
Plus: Grant cancellations			\$0.00
Total Amount Available for Grants in FYE 6/30/2022	\$1,070,436.00	\$0.00	\$1,070,436.00
"Contractual" Funding Obligations			
Less: Jewish Family Services ² CSB reserve Fund	(\$10,928.48)		(\$10,928.48)
Less: Jewish Historical Society ³ CSB reserve Fund	(\$1,687.25)		(\$1,687.25)
Less: Grants to Federation from Board-restricted funds benefiting the Foundation and the Federation	(\$5,037.40)	\$0.00	(\$5,037.40)
Less: Grants to Federation for its discretionary use	(\$148,878.00)	\$0.00	(\$148,878.00)
Board Discretionary Grants			
Less: Jewish Community Foundation Operating Support FYE 6/30/2022	(\$185,000.00)		(\$185,000.00)
Above the Line Grants Awarded in FYE 6/30/2022	(\$351,531.13)	\$0.00	(\$351,531.13)
"Competitive" Grants			
Less: JT Connect Program Associate ⁴	(\$35,000.00)		(\$35,000.00)
Less: Jewish Federation of Greater Hartford Wexner Heritage Program ⁵	(\$11,666.00)		(\$11,666.00)
Less: Mikveh Bess Israel Building Toward the Future ⁶	(\$25,000.00)		(\$25,000.00)
			\$0.00
Competitive Grants Awarded in FYE 6/30/2022	(\$71,666.00)	\$0.00	(\$71,666.00)
"Synagogue Community Building Grants"			
			\$0.00
Synagogue Grants Awarded in FYE 6/30/22	\$0.00	\$0.00	\$0.00
Total Community Grants Awarded in FYE 6/30/2022	(\$423,197.13)	\$0.00	(\$423,197.13)
Grants Reserve	\$233,900.00		\$233,900.00
Grant Spending Amount available in FYE 6/30/2022	\$647,238.87	\$0.00	\$881,138.87

¹ This projected amount is equal to 3.75% (5% spending less 1.25% administrative fee) of the 20-quarter trailing average balance of unrestricted community funds as of June 30, 2021, adjusted to take into account the minimum and maximum spending limitations under the Foundation's spending policy.

² Per an agreement with JFGH, JCF will contribute \$10,928.48 annually to the CSB reserve fund on behalf of JFS FY2021-2026

³Per an agreement with JFGH, JCF will contribute \$1,687.25 annually to the CSB reserve fund on behalf of JHS FY2021-2026

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

⁵The total grant to the Jewish Federation is \$35,000 over 3 years (FY20-\$11,667, FY21-\$11,667 and FY22-\$11,666)

⁶The total grant to the Mikveh is \$75,000 over 3 years (FY21-\$35,000, FY22-25,000 and FY23-\$15,000)

S:\Exce\FY2021\Community Grants Budget FY2022

Donor Advised Grants
June 7, 2021 - August 15, 2021

Grantee	Program Name	Grant Date	Grant Amount
10,000 Degrees	BFA Scholarship Fund	6/14/2021	\$6,240
ALS Association	general operating support in memory of Bill Huber	7/12/2021	\$100
Anti-Defamation League CT Regional Office	general operating support	6/15/2021	\$500
Ben Bronz Foundation Inc.	Gold Sponsor for October event (no benefits received)	7/15/2021	\$1,000
Beth El Temple of West Hartford	dues, BEMA , Men's and Women's clubs and Brown Family Acc	7/8/2021	\$2,911
Beth El Temple of West Hartford	general operating support	7/8/2021	\$2,786
Beth El Temple of West Hartford	general operating support	7/8/2021	\$3,600
Beth El Temple of West Hartford	general operating support	7/15/2021	\$350
Beth El Temple of West Hartford	general operating support	7/15/2021	\$2,000
Beth El Temple of West Hartford	general operating support	7/19/2021	\$385
Beth Israel Synagogue	cemetery maintenance In memory of Joe and Eva Pinsker	7/12/2021	\$150
Camp Ramah in New England	agam support	7/14/2021	\$720
Chabad Chevra	eruv	7/14/2021	\$500
Chabad House of Greater Hartford	general operating support	7/8/2021	\$1,800
Chabad House of Greater Hartford	general operating support	7/23/2021	\$1,800
Colby College	Center for Small Town Jewish Life	8/5/2021	\$5,000
Congregation Beth Israel	CBI Cemetery Fence project	6/7/2021	\$2,000
Congregation Beth Israel	CBI sanctuary masonry restoration project	6/18/2021	\$5,000
Congregation B'nai Jeshurun	general operating support and endowment	7/14/2021	\$396
Dana-Farber Cancer Institute	general operating support	6/9/2021	\$500
Emanuel Synagogue	2020 - 21 dues and Adler Paydown account	6/14/2021	\$2,000
Emanuel Synagogue	Ben Engel play	7/9/2021	\$1,000
Emanuel Synagogue	general operating support	6/21/2021	\$3,600
Emanuel Synagogue	general operating support	8/2/2021	\$1,000
Emanuel Synagogue	November Havdalah Program	7/29/2021	\$1,000
Farmington Valley Jewish Congregation - Emek Shalom	Rabbi's Discretionary Fund	8/5/2021	\$5,000
Hadar	With gratitude for Rabbi Shai Held's summer lecture series	7/12/2021	\$250
Hadassah Hartford Chapter	5 trees in celebration of the Vaccariello wedding	7/12/2021	\$90
Hartford Foundation for Public Giving	Boccaccio Family Trust in memory of John Boccaccio	7/12/2021	\$100
Hartford Symphony Orchestra	general operating support	7/30/2021	\$2,500

Donor Advised Grants
June 7, 2021 - August 15, 2021

Hebrew Senior Care	general operating support	7/1/2021	\$6,500
Inside the Middle East	general operating support	6/22/2021	\$1,000
Jewish Community Foundation of Greater Hartford, Inc.	Endow Hartford 21 Match Fund	7/7/2021	\$100,000
Jewish Family Services of Greater Hartford	Kosher Food Pantry	6/18/2021	\$1,000
Jewish Federation of Greater Hartford	American Jewish Joint Distribution Committee	7/14/2021	\$10,000
Jewish Federation of Greater Hartford	Children's Reading Partners	6/14/2021	\$3,000
Jewish Federation of Greater Hartford	Children's Reading Partners Teacher Incentive Program	6/14/2021	\$2,500
Jewish Federation of Greater Hartford	general operating support	6/11/2021	\$500
Jewish Federation of Greater Hartford	general operating support	6/24/2021	\$10,000
Jewish Federation of Greater Hartford	Jessie's Community Gardens in memory of Jessica Kostin	8/5/2021	\$250
Jewish Federation of Greater Hartford	Jewish Leadership Academy	7/29/2021	\$3,672
Jewish Federation of Greater Hartford	local programs focused on social committment	6/14/2021	\$27,500
Jewish Federation of Greater Hartford	Secure Community Initiative	6/14/2021	\$2,500
Jewish Federation of Greater Hartford	Wexner Heritage Program	6/7/2021	\$1,800
Jewish Federation of Greater Hartford	Wexner Institute - years 1 and 2	7/13/2021	\$3,600
Jewish Federation of Greater Washington	general operating support	7/2/2021	\$5,000
Jewish Social Service Agency	Healthy Minds Fairfax and clinician training	7/2/2021	\$20,000
Joyce D. and Andrew J. Mandell Jewish Community Center	Jonathan's Dream Playground maintenance	7/1/2021	\$2,500
Middle East Forum of Falmouth	general operating support	7/15/2021	\$5,000
Moishe House	Moishe house International Fund and Moishe Pod W. Hartford	7/14/2021	\$2,000
Roswell Park Alliance Foundation	Jeff Bauer's Empire State Ride	7/8/2021	\$500
Solomon Schechter Day School of Greater Hartford	general operating support	7/13/2021	\$600
Solomon Schechter Day School of Greater Hartford	general operating support in honor of Andrea Kasper	6/7/2021	\$250
Temple Emanuel of Newton	general operating support	7/30/2021	\$2,970
Temple Sholom	Building Fund for the account of Mr. and Mrs. Jeremy Kostin	7/15/2021	\$1,000
Temple Sholom	Building Fund for the account of Mr. and Mrs. Keith Chernoff	7/15/2021	\$1,000
Temple Sinai Brookline	dues	7/22/2021	\$2,390
The Rotary Foundation	general operating support (Rotary Club #6519 in District #7890)	7/9/2021	\$500
United Synagogues of Greater Hartford	general operating support	7/16/2021	\$600
University of Connecticut Hillel	general operating support	7/8/2021	\$500
University of Pennsylvania - The Penn Fund	scholarships for Jewish students - Class of 1967 endowment	6/16/2021	\$2,500

Donor Advised Grants
June 7, 2021 - August 15, 2021

University of Pennsylvania - The Penn Fund	scholarships for Jewish students - Class of 1992 endowment	6/16/2021	\$2,500
Upstate Medical College Alumni Association	financial need-based scholarships	6/15/2021	\$10,000
Wadsworth Atheneum Museum of Art	Brandy Culp's exhibition on contemporary glass.	7/19/2021	\$1,000
Watkinson School	Ribicoff/Head Scholar	8/2/2021	\$5,000
TOTAL	65 Grants		\$293,910

Designated Grants
June 6, 2021 - August 15, 2021

Grantee	Program Name	Grant Date	Grant Amount
American Cancer Society-New England Division	general operating support	7/20/2021	\$233.40
American Israel Education Foundation	general operating support	7/20/2021	\$5,000.00
American Red Cross-Greater Hartford Chapter	general operating support	7/20/2021	\$233.40
American Society for Technion	general operating support	7/20/2021	\$1,042.49
Beth David Synagogue	general operating support	7/20/2021	\$314.26
Beth David Synagogue	general support with priority to recruiting students and others to attend services	7/20/2021	\$199.58
Beth El Temple of West Hartford	general operating support	7/20/2021	\$340.88
Beth El Temple of West Hartford	general operating support	7/20/2021	\$633.34
Beth El Temple of West Hartford	general operating support	7/20/2021	\$641.30
Beth El Temple of West Hartford	general operating support	7/20/2021	\$3,559.49
Beth El Temple of West Hartford	general operating support	7/20/2021	\$5,000.00
Brown University	support of Judaic Studies Department and Egyptology Dept.	7/20/2021	\$210.06
Chabad House of Greater Hartford	general operating support	7/20/2021	\$211.11
Charter Oak Cultural Center	Celebration of Jewish Arts and Culture	7/20/2021	\$1,500.00
Charter Oak Cultural Center	general operating support	7/20/2021	\$261.16
Charter Oak Cultural Center	general operating support	7/20/2021	\$891.65
Charter Oak Cultural Center	general operating support	7/20/2021	\$1,064.28
Charter Oak Cultural Center	programs for the homeless	7/20/2021	\$422.35
COMPASS Youth Collaborative	general operating support	6/23/2021	\$10,000.00
Congregation Adath Israel	general operating support	7/20/2021	\$5,281.54
Congregation Adath Israel	general operating support	7/20/2021	\$5,288.06
Congregation Adath Israel	scholarships	6/10/2021	\$20,006.00
Congregation Beth Israel	books and materials in support of the CBI Tots Program	7/20/2021	\$558.79
Congregation Beth Israel	cantorial and music programs	7/20/2021	\$7,568.99
Congregation Beth Israel	education programs	7/20/2021	\$1,300.78
Congregation Beth Israel	educational programs and projects for children eligible for	7/20/2021	\$1,110.47
Congregation Beth Israel	general operating support	7/20/2021	\$201.09
Congregation Beth Israel	general operating support	7/20/2021	\$231.10
Congregation Beth Israel	general operating support	7/20/2021	\$234.67

Designated Grants
June 6, 2021 - August 15, 2021

Congregation Beth Israel	general operating support	7/20/2021	\$263.27
Congregation Beth Israel	general operating support	7/20/2021	\$297.02
Congregation Beth Israel	general operating support	7/20/2021	\$413.97
Congregation Beth Israel	general operating support	7/20/2021	\$419.38
Congregation Beth Israel	general operating support	7/20/2021	\$434.34
Congregation Beth Israel	general operating support	7/20/2021	\$440.66
Congregation Beth Israel	general operating support	7/20/2021	\$478.59
Congregation Beth Israel	general operating support	7/20/2021	\$691.56
Congregation Beth Israel	general operating support	7/20/2021	\$709.98
Congregation Beth Israel	general operating support	7/20/2021	\$815.92
Congregation Beth Israel	general operating support	7/20/2021	\$953.64
Congregation Beth Israel	general operating support	7/20/2021	\$960.72
Congregation Beth Israel	general operating support	7/20/2021	\$971.17
Congregation Beth Israel	general operating support	7/20/2021	\$1,046.06
Congregation Beth Israel	general operating support	7/20/2021	\$1,203.53
Congregation Beth Israel	general operating support	7/20/2021	\$1,264.82
Congregation Beth Israel	general operating support	7/20/2021	\$1,584.00
Congregation Beth Israel	general operating support	7/20/2021	\$1,750.43
Congregation Beth Israel	general operating support	7/20/2021	\$3,447.86
Congregation Beth Israel	general operating support	7/20/2021	\$5,127.02
Congregation Beth Israel	general operating support	7/20/2021	\$5,975.73
Congregation Beth Israel	programs that support Jewish history at Congregation B	7/20/2021	\$389.95
Congregation Beth Israel	programs within the synagogue that are outside of its re	7/20/2021	\$725.96
Congregation Beth Israel	salary and health and welfare benefits for Senior Rabbi	7/20/2021	\$4,471.74
Congregation Beth Israel	salary of highest compensated first grade teacher and ac	7/20/2021	\$3,710.94
Congregation Beth Israel	Sunday school prizes and the SAGE program	7/20/2021	\$501.56
Congregation Beth Israel	the Deborah Library	7/20/2021	\$192.51
Congregation Beth Israel	the Legacy for Our Future program	7/20/2021	\$833.29
Congregation Beth Shalom Rodfe Zedek	general operating support	7/20/2021	\$2,114.09
Congregation Kol Haverim	building and maintenance upkeep	7/20/2021	\$726.15
Congregation Kol Haverim	educational programs	7/20/2021	\$1,161.86

Designated Grants
June 6, 2021 - August 15, 2021

Congregation Kol Haverim	general operating support	7/20/2021	\$465.02
Congregation Kol Haverim	general operating support	7/20/2021	\$558.07
Congregation Kol Haverim	general operating support	7/20/2021	\$601.38
Congregation Kol Haverim	support of the religious school	7/20/2021	\$479.37
Congregation P'nai Or of Central Connecticut	general operating support	7/20/2021	\$237.95
Connecticut Children's Medical Center Foundation, Inc.	counseling and bereavement services for families who have lost a child or are experiencing a traumatic health crisis	7/20/2021	\$409.54
Connecticut Public Broadcasting, Inc.	general operating support	7/20/2021	\$5,000.00
Emanuel Synagogue	general operating support	7/20/2021	\$71.26
Emanuel Synagogue	general operating support	7/20/2021	\$113.82
Emanuel Synagogue	general operating support	7/20/2021	\$197.57
Emanuel Synagogue	general operating support	7/20/2021	\$215.94
Emanuel Synagogue	general operating support	7/20/2021	\$614.50
Emanuel Synagogue	general operating support	7/20/2021	\$1,025.76
Emanuel Synagogue	general operating support	7/20/2021	\$1,044.64
Emanuel Synagogue	general operating support	7/20/2021	\$1,790.45
Federation Homes, Inc.	special programming for elderly and disabled residents	7/20/2021	\$3,929.30
Hadassah Hartford Chapter	general operating support	7/20/2021	\$253.67
Hadassah Hartford Chapter	general operating support	7/20/2021	\$5,000.00
HARC, Inc.	general operating support	7/20/2021	\$164.04
Hartford Hospital	nursing education and professional development	7/20/2021	\$5,000.00
Hebrew Senior Care	books, games, puzzles and other amenities for Senior Day	7/20/2021	\$590.43
Hebrew Senior Care	education programs for residents	7/20/2021	\$567.01
Hebrew Senior Care	general operating support	7/20/2021	\$188.72
Hebrew Senior Care	general operating support	7/20/2021	\$735.59
Hebrew Senior Care	general operating support	7/20/2021	\$1,264.82
Hebrew Senior Care	general operating support	7/20/2021	\$1,477.80
Hebrew Senior Care	general operating support	7/20/2021	\$2,234.36
Hebrew Senior Care	general operating support	7/20/2021	\$5,000.00
Hebrew Senior Care	Jewish religious functions of Hebrew Senior Care	7/20/2021	\$225.64

Designated Grants
June 6, 2021 - August 15, 2021

Hebrew Senior Care	programs and services for the elderly	7/20/2021	\$1,570.41
Hebrew Senior Care	renovations and/or expansion projects or general maintenance support	7/20/2021	\$319.84
Hebrew Senior Care	social and recreational activities	7/20/2021	\$823.84
Hillel Academy of Broome County	general operating support	7/20/2021	\$219.99
Jewish Association for Community Living	client assistance fund	7/20/2021	\$1,000.00
Jewish Association for Community Living	general operating support	7/20/2021	\$173.96
Jewish Association for Community Living	general operating support	7/20/2021	\$217.91
Jewish Association for Community Living	general operating support	7/20/2021	\$231.56
Jewish Association for Community Living	general operating support	7/20/2021	\$252.41
Jewish Association for Community Living	general operating support	7/20/2021	\$327.92
Jewish Association for Community Living	general operating support	7/20/2021	\$363.35
Jewish Association for Community Living	general operating support	7/20/2021	\$377.75
Jewish Association for Community Living	general operating support	7/20/2021	\$384.07
Jewish Association for Community Living	general operating support	7/20/2021	\$390.79
Jewish Association for Community Living	general operating support	7/20/2021	\$408.58
Jewish Association for Community Living	general operating support	7/20/2021	\$459.20
Jewish Association for Community Living	general operating support	7/20/2021	\$479.26
Jewish Association for Community Living	general operating support	7/20/2021	\$488.13
Jewish Association for Community Living	general operating support	7/20/2021	\$551.19
Jewish Association for Community Living	general operating support	7/20/2021	\$560.44
Jewish Association for Community Living	general operating support	7/20/2021	\$584.55
Jewish Association for Community Living	general operating support	7/20/2021	\$597.76
Jewish Association for Community Living	general operating support	7/20/2021	\$619.56
Jewish Association for Community Living	general operating support	7/20/2021	\$2,328.08
Jewish Association for Community Living	general operating support	7/20/2021	\$4,040.84
Jewish Association for Community Living	general operating support	7/20/2021	\$5,000.00
Jewish Association for Community Living	general operating support	7/20/2021	\$7,500.00
Jewish Association for Community Living	general operating support	7/20/2021	\$8,487.91
Jewish Association for Community Living	job training and coaching	7/20/2021	\$2,300.00
Jewish Community Foundation of Greater Hartford, Inc.	general operating support	7/20/2021	\$1,370.00

Designated Grants
June 6, 2021 - August 15, 2021

Jewish Community Foundation of Greater Hartford, Inc.	general operating support	7/20/2021	\$18,022.72
Jewish Community Foundation of Greater Hartford, Inc.	staff professional development	7/20/2021	\$4,042.56
Jewish Family Services of Greater Hartford	chronic needs program	7/20/2021	\$1,596.91
Jewish Family Services of Greater Hartford	general operating support	7/1/2021	\$500.00
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$217.11
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$222.72
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$230.40
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$274.00
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$288.91
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$301.71
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$371.63
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$828.21
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$977.30
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$1,166.02
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$1,264.82
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$1,477.80
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$1,772.72
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$1,891.61
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$2,033.05
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$2,522.95
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$5,000.00
Jewish Family Services of Greater Hartford	general operating support	7/20/2021	\$12,212.20
Jewish Family Services of Greater Hartford	general operating support, with a priority given to Jessie's Community Garden and programs related to feeding the hungry	7/20/2021	\$202.99
Jewish Family Services of Greater Hartford	Kosher food pantry	7/20/2021	\$242.32
Jewish Family Services of Greater Hartford	mental health care for low income senior adults	7/20/2021	\$25,000.00
Jewish Family Services of Greater Hartford	support of older men and women, especially those who	7/20/2021	\$7,500.00
Jewish Family Services of Greater Hartford	Tara's Closet	7/20/2021	\$226.50
Jewish Family Services of Greater Hartford	the Benet A. Rothstein Child Services Program	7/20/2021	\$211.15
Jewish Family Services of Greater Hartford	the chronic needs program	7/20/2021	\$1,290.60

Designated Grants
June 6, 2021 - August 15, 2021

Jewish Family Services of Greater Hartford	the chronic needs program	7/20/2021	\$1,801.20
Jewish Family Services of Greater Hartford	transportation for low income seniors	7/20/2021	\$2,000.00
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$69.16
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$121.88
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$196.44
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$198.23
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$203.01
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$226.05
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$234.91
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$236.79
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$260.87
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$262.57
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$270.55
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$288.74
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$333.55
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$388.54
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$399.97
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$403.63
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$407.45
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$433.51
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$444.62
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$479.77
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$483.19
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$533.34
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$578.64
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$616.88
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$642.59
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$671.91
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$806.03
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$828.05
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$858.04

Designated Grants
June 6, 2021 - August 15, 2021

Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$953.46
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$995.89
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$999.81
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,009.25
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,048.88
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,118.77
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,247.04
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,412.37
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,412.98
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,509.11
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,566.49
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,686.68
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,699.96
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,707.35
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,946.89
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,947.20
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$1,982.75
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$2,015.91
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$2,388.93
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$2,729.45
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$2,805.35
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$2,870.15
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$4,248.15
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$4,462.01
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$4,476.27
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$4,784.70
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$5,169.43
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$5,177.29
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$5,880.45
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$6,616.13
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$7,493.13

Designated Grants
June 6, 2021 - August 15, 2021

Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$8,149.60
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$9,514.25
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$10,000.00
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$12,538.10
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$12,713.90
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$13,937.20
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$20,618.75
Jewish Federation of Greater Hartford	Annual Campaign	7/20/2021	\$59,798.29
Jewish Federation of Greater Hartford	Annual Campaign with the larger portion to support needs of Jews overseas	7/20/2021	\$4,511.72
Jewish Federation of Greater Hartford	cemetery maintenance	7/20/2021	\$6,280.01
Jewish Federation of Greater Hartford	cemetery maintenance 4/1/21 - 6/30/21	6/7/2021	\$15,252.00
Jewish Federation of Greater Hartford	cemetery maintenance of the Moses Montefiore section of Zion Hill Cemetery	7/20/2021	\$458.92
Jewish Federation of Greater Hartford	Children's Reading Partners	7/20/2021	\$158.98
Jewish Federation of Greater Hartford	CJEL - professional development of Jewish educators	7/20/2021	\$141.65
Jewish Federation of Greater Hartford	COVID-19 relief efforts	7/19/2021	\$3,000.00
Jewish Federation of Greater Hartford	educational scholarships	7/20/2021	\$1,445.66
Jewish Federation of Greater Hartford	general operating support	7/1/2021	\$5,037.40
Jewish Federation of Greater Hartford	general operating support	7/20/2021	\$5,000.00
Jewish Federation of Greater Hartford	general operating support	7/20/2021	\$12,000.00
Jewish Federation of Greater Hartford	gravestone maintenance and upkeep for Zion Hill cemetery	7/20/2021	\$266.04
Jewish Federation of Greater Hartford	historic Hartford Jewish cemeteries capital restoration	7/20/2021	\$3,041.31
Jewish Federation of Greater Hartford	Israeli elections lecture	7/19/2021	\$400.00
Jewish Federation of Greater Hartford	Jewish senior adult needs in Greater Hartford, especially	7/20/2021	\$5,314.70
Jewish Federation of Greater Hartford	leadership programs	7/20/2021	\$113.82
Jewish Federation of Greater Hartford	medical funds for Israel	7/20/2021	\$2,346.01
Jewish Federation of Greater Hartford	Temple B'nai Abraham Cemetery maintenance	7/20/2021	\$3,619.34
Jewish Federation of Greater Hartford	the Scribner Library	7/20/2021	\$271.79
Jewish Federation of Greater Hartford	to be used first for Young Leadership Awards and then for	7/20/2021	\$8,125.50
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$146.53

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Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$149.97
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$165.53
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$187.25
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$195.03
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$213.40
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$214.14
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$233.32
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$279.69
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$283.34
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$365.00
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$403.53
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$422.23
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$522.21
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$556.47
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$569.21
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$597.76
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$736.49
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$1,087.37
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$1,166.02
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$5,000.00
Jewish Historical Society of Greater Hartford	general operating support	7/20/2021	\$5,932.54
Jewish Teen Learning Connection	general operating support	7/20/2021	\$280.99
Jewish Teen Learning Connection	general operating support	7/20/2021	\$375.70
Jewish Teen Learning Connection	general operating support	7/20/2021	\$427.42
Jewish Teen Learning Connection	general operating support	7/20/2021	\$8,810.81
JFACT Fund, Inc.	educational programs and activities	7/20/2021	\$523.66
JFACT Fund, Inc.	educational programs and activities	7/20/2021	\$2,829.23
JFACT Fund, Inc.	educational programs and activities	7/20/2021	\$4,183.93
JFACT Fund, Inc.	educational programs and activities	7/20/2021	\$7,632.73
JFACT Fund, Inc.	general operating support	7/20/2021	\$5,000.00
Johns Hopkins Hillel	shabbat dinners	7/20/2021	\$189.73

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Joyce D. and Andrew J. Mandell Jewish Community Center	Beatrice Fox Auerbach Early Childhood Center	7/20/2021	\$325.47
Joyce D. and Andrew J. Mandell Jewish Community Center	Camp Shalom scholarship fund	7/20/2021	\$274.58
Joyce D. and Andrew J. Mandell Jewish Community Center	Camp Shalom scholarship fund	7/20/2021	\$510.12
Joyce D. and Andrew J. Mandell Jewish Community Center	Camp Shalom scholarship fund	7/20/2021	\$641.02
Joyce D. and Andrew J. Mandell Jewish Community Center	capital needs	7/20/2021	\$320.58
Joyce D. and Andrew J. Mandell Jewish Community Center	cultural arts programs	7/20/2021	\$2,613.73
Joyce D. and Andrew J. Mandell Jewish Community Center	ECC scholarships	7/20/2021	\$4,572.43
Joyce D. and Andrew J. Mandell Jewish Community Center	educational, literary, religious and other charitable purposes	7/20/2021	\$7,398.87
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$90.79
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$103.41
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$124.83
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$222.53
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$288.74
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$312.87
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$355.59
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$480.05
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$484.61
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$543.71
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$644.91
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$735.82
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$813.77
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$936.11
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$1,032.50
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$1,264.82
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$1,446.77
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$3,800.00
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$5,000.00
Joyce D. and Andrew J. Mandell Jewish Community Center	general operating support	7/20/2021	\$9,700.00
Joyce D. and Andrew J. Mandell Jewish Community Center	Hartford Jewish Film Festival	7/20/2021	\$214.94
Joyce D. and Andrew J. Mandell Jewish Community Center	Hartford Jewish Film Festival	7/20/2021	\$386.06
Joyce D. and Andrew J. Mandell Jewish Community Center	Hartford Jewish Film Festival	7/20/2021	\$983.82

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Joyce D. and Andrew J. Mandell Jewish Community Center	Hartford Jewish Film Festival-film focused on the Holocaust	7/20/2021	\$15,920.50
Joyce D. and Andrew J. Mandell Jewish Community Center	Jonathan's Dream playground maintenance	7/20/2021	\$208.35
Joyce D. and Andrew J. Mandell Jewish Community Center	membership subsidies for low income seniors	7/20/2021	\$2,550.00
Joyce D. and Andrew J. Mandell Jewish Community Center	men's health club breakfasts and other purposes of mer	7/20/2021	\$6,432.59
Joyce D. and Andrew J. Mandell Jewish Community Center	operating support of the free weight section of fitness c	7/20/2021	\$220.29
Joyce D. and Andrew J. Mandell Jewish Community Center	PJ Library	7/20/2021	\$575.00
Joyce D. and Andrew J. Mandell Jewish Community Center	programs and projects for children	7/20/2021	\$336.44
Joyce D. and Andrew J. Mandell Jewish Community Center	racquetball court mainteance	7/20/2021	\$165.04
Joyce D. and Andrew J. Mandell Jewish Community Center	scholarships for children to participate in youth and/or	7/20/2021	\$222.35
	teen theater programs		
Joyce D. and Andrew J. Mandell Jewish Community Center	senior adult programs	7/20/2021	\$1,611.81
Joyce D. and Andrew J. Mandell Jewish Community Center	senior adult programs	7/20/2021	\$2,816.91
Joyce D. and Andrew J. Mandell Jewish Community Center	special needs programming	7/20/2021	\$250.61
Joyce D. and Andrew J. Mandell Jewish Community Center	special needs programs	7/20/2021	\$425.80
Joyce D. and Andrew J. Mandell Jewish Community Center	support of arts and cultural programming	7/20/2021	\$798.42
Joyce D. and Andrew J. Mandell Jewish Community Center	support of the fitness center and Hartford Jewish Film	7/20/2021	\$6,270.84
Joyce D. and Andrew J. Mandell Jewish Community Center	swim and tennis club general operating support	7/20/2021	\$168.81
Joyce D. and Andrew J. Mandell Jewish Community Center	unique and non-recurring or emergency needs	7/20/2021	\$339.11
Klingberg Family Centers	general operating support	7/12/2021	\$10,000.00
Maurice Greenberg Center for Judaic Studies	support of the Greenberg Center for Judaic Studies	7/20/2021	\$210.06
Nefesh B'Nefesh	general operating support	7/20/2021	\$1,980.00
New England Jewish Academy	capital needs	7/20/2021	\$773.91
New England Jewish Academy	furthering the Jewish education of young persons	7/20/2021	\$2,391.21
New England Jewish Academy	general operating support	7/20/2021	\$69.16
New England Jewish Academy	general operating support	7/20/2021	\$165.53
New England Jewish Academy	general operating support	7/20/2021	\$174.72
New England Jewish Academy	general operating support	7/20/2021	\$175.51
New England Jewish Academy	general operating support	7/20/2021	\$226.04
New England Jewish Academy	general operating support	7/20/2021	\$236.79
New England Jewish Academy	general operating support	7/20/2021	\$242.63
New England Jewish Academy	general operating support	7/20/2021	\$251.30

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New England Jewish Academy	general operating support	7/20/2021	\$265.15
New England Jewish Academy	general operating support	7/20/2021	\$405.05
New England Jewish Academy	general operating support	7/20/2021	\$416.09
New England Jewish Academy	general operating support	7/20/2021	\$565.26
New England Jewish Academy	general operating support	7/20/2021	\$735.59
New England Jewish Academy	general operating support	7/20/2021	\$942.78
New England Jewish Academy	general operating support	7/20/2021	\$1,022.07
New England Jewish Academy	general operating support	7/20/2021	\$1,022.13
New England Jewish Academy	general operating support	7/20/2021	\$3,000.00
New England Jewish Academy	general operating support	7/20/2021	\$5,000.00
New England Jewish Academy	general operating support	7/20/2021	\$6,740.85
New England Jewish Academy	general operating support	7/20/2021	\$7,637.36
New England Jewish Academy	girls athletic activities or art, music and Jewish cultural p	7/20/2021	\$323.91
New England Jewish Academy	scholarships	7/20/2021	\$82.02
New England Jewish Academy	scholarships	7/20/2021	\$278.58
New England Jewish Academy	scholarships	7/20/2021	\$600.00
New England Jewish Academy	scholarships	7/20/2021	\$28,207.86
New England Jewish Academy	the Scribner Library	7/20/2021	\$271.79
ORT America	general operating support	7/20/2021	\$236.06
Saint Francis Hospital and Medical Center Foundation Inc.	nursing education and professional development	7/20/2021	\$5,000.00
Solomon Schechter Day School of Greater Hartford	8th grade Israel trip scholarships	7/20/2021	\$1,644.33
Solomon Schechter Day School of Greater Hartford	8th grade trip to Israel	7/20/2021	\$1,681.64
Solomon Schechter Day School of Greater Hartford	after school athletic programs	7/20/2021	\$399.10
Solomon Schechter Day School of Greater Hartford	enrichment of the Judaic education of the school's students a	7/20/2021	\$1,354.28
Solomon Schechter Day School of Greater Hartford	Florence S. Cramer Prize for Mathematics	7/20/2021	\$190.88
Solomon Schechter Day School of Greater Hartford	furthering the Jewish education of young persons	7/20/2021	\$2,391.21
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$138.69
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$157.54
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$175.51
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$196.58
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$213.41

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Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$266.43
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$267.46
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$335.84
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$365.29
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$386.80
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$453.63
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$3,820.49
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$5,000.00
Solomon Schechter Day School of Greater Hartford	general operating support	7/20/2021	\$5,798.00
Solomon Schechter Day School of Greater Hartford	honoring milestones in students' Jewish education	7/20/2021	\$559.86
Solomon Schechter Day School of Greater Hartford	literature awards	7/20/2021	\$273.70
Solomon Schechter Day School of Greater Hartford	maintenance of Temple B'nai Israel memorial plaques	7/20/2021	\$441.75
Solomon Schechter Day School of Greater Hartford	music programs	7/20/2021	\$114.59
Solomon Schechter Day School of Greater Hartford	programs in mathematics and science	7/20/2021	\$608.88
Solomon Schechter Day School of Greater Hartford	scholarships	7/20/2021	\$82.02
Solomon Schechter Day School of Greater Hartford	scholarships	7/20/2021	\$600.00
Solomon Schechter Day School of Greater Hartford	scholarships	7/20/2021	\$644.08
Solomon Schechter Day School of Greater Hartford	scholarships	7/20/2021	\$810.32
Solomon Schechter Day School of Greater Hartford	scholarships	7/20/2021	\$2,138.91
Solomon Schechter Day School of Greater Hartford	scholarships for students who have demonstrated	7/20/2021	\$992.56
Solomon Schechter Day School of Greater Hartford	science and technology enrichment	7/20/2021	\$480.85
Solomon Schechter Day School of Greater Hartford	Zelda Cramer Ungar Technology Prize	7/20/2021	\$250.09
Temple Sinai	youth activities	7/20/2021	\$2,420.57
The First Tee of Connecticut	Daniel J. Novarr Scholarship	7/20/2021	\$221.38
The Good People Fund	food insecurity programs in Israel	7/20/2021	\$575.00
Trinity College	to enhance programs outside the general operating	7/20/2021	\$12,630.99
	budget of the tennis teams		
Trinity College Hillel	general operating support	7/20/2021	\$2,248.32
United States Holocaust Memorial Museum	general operating support	7/20/2021	\$5,000.00
University of Connecticut Foundation, Inc.	nursing education and professional development	7/20/2021	\$5,000.00
University of Connecticut Hillel	general operating support	7/20/2021	\$2,210.70

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University of Connecticut Hillel	general operating support	7/20/2021	\$2,894.90
University of Connecticut Hillel	general operating support	7/20/2021	\$5,000.00
University of Hartford Hillel	University of Hartford Hillel general operating support	7/20/2021	\$1,978.29
University of Hartford Hillel	University of Hartford Hillel general operating support	7/20/2021	\$3,505.58
University of Hartford Hillel	University of Hartford Hillel general operating support	7/20/2021	\$5,000.00
University of Saint Joseph	general operating support	7/20/2021	\$105.03
University of Vermont	Center for Holocaust Studies	7/20/2021	\$105.03
Voices of Hope	general operating support	7/20/2021	\$3,908.92
Voices of Hope	Holocaust educational programs for secular institutions	7/20/2021	\$1,826.87
WIZO USA	general operating support	7/20/2021	\$198.25
TOTAL	402 Grants		\$919,821.61