

# Guiding Principles

You may have heard that The Jewish Federation of Greater Washington has been asking some fundamental questions.

- How do we adapt to the rapid pace of change in technology and philanthropy?
- How do we engage the next generation of Jews?
- How do we reduce barriers to participation in Jewish life?
- How do we better inspire, galvanize, and catalyze our community?
- How do we generate funds so that we remain a lifeline to those who depend upon us today, while investing in our community's future?

In October, our Federation Board unanimously approved a set of Guiding Principles that will allow us to address these questions with focus, determination, and, ultimately, with demonstrated results. We will hold ourselves accountable and report to you, our closest stakeholders, on a regular basis.

In support of our Guiding Principles, many innovative projects are under development, and some are already being implemented. We recently launched Jconnect.org, a vibrant online information portal developed in conjunction with many community agencies. You will also be hearing more about our ConnectGens Fellowship program, which will unleash the creativity and leadership of young adults and capitalize on their entrepreneurial spirit. And, Create a Jewish Legacy is an innovative program designed to transform philanthropy in our community.

Throughout the year we will showcase these and other new initiatives that will serve our community in meaningful and forward looking ways.

## FOR MORE INFORMATION, PLEASE CONTACT:

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## Guiding Principles

- **Adapt** to changing realities in the Jewish and philanthropic worlds by enhancing **high-impact** programs, implementing new, **cutting-edge** initiatives and services and eliminating duplication
- **Energize, motivate** and **re-connect** with community through a well-articulated vision for the future
- Create personally **meaningful connections** between members of our community, Israel, Jews around the world and organizations we support
- **Reduce barriers** to active participation in Jewish life, financial, geographic, demographic or social
- **Communicate** broadly and clearly what we do well and what we're going to do differently
- Create strong partnerships with agencies and synagogues as a **community leader, convener** and **catalyzer** so that we can plan strategically and effectively with a strong, collective voice
- **Elevate** our customer service to be highly responsive and welcoming to all our stakeholders
- Expand our donor-base and motivate current donors to increase their giving **impact** through opportunities that make a **meaningful difference** in our community

To learn more about these **Guiding Principles** go to [shalomdc.org/principles](http://shalomdc.org/principles)

## YOUR STATEMENT

2011

# Making a Statement

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## Message from the President and Managing Director

Happy Chanukah! Enclosed you will find your quarterly statement for your fund at the United Jewish Endowment Fund (UJEF). Please note that your quarterly statement reflects contributions and distribution activity as well as investment performance through September 30, 2011. As the calendar year is coming to an end, we wanted to make sure that we provided you with some important year-end tax information in this edition of Making a Statement – so be sure to check out our giving tip on page 2.

We would like to extend a hearty *Mazel Tov!* to David J. Butler on being United Jewish Endowment Fund's recipient of the Jewish Federations of North America's 2011 Endowment Achievement Award. David has been a passionate advocate for the Jewish community in the Washington DC area, taking active roles in several Jewish organizations. As you may already know, David was President of the United Jewish Endowment Fund from 2008–2011; President of The Jewish Federation of Greater Washington from 2004–2006; and Chair of the Federation's Annual Campaign from 2001–2004. He was also the past president of Kemp Mill Synagogue and Melvin J. Berman Hebrew Academy and past treasurer of the Jewish Community Relations Council. **Please join us in congratulating David Butler!**

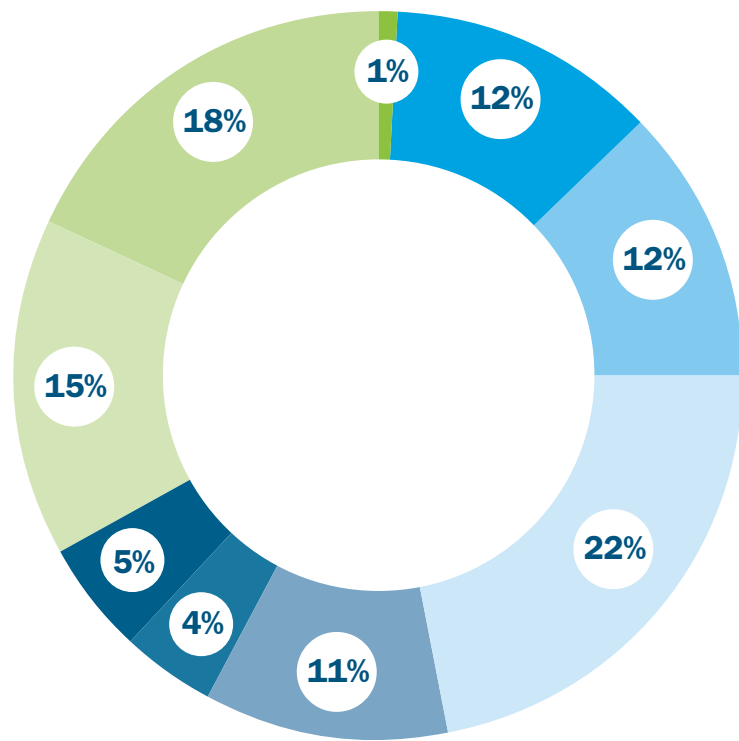
As always, we hope that you will contact us with any questions that you may have at 301-230-7230 or [endowment@shalomdc.org](mailto:endowment@shalomdc.org).

Best Regards,

Ronald A. Paul, M.D.  
President

Eileen Frazier  
Managing Director

Portfolio Allocation September 2011

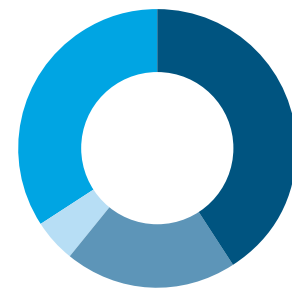


Equity 66%

- 12% Domestic Stocks
- 12% International Stocks
- 22% Long/Short and Event Driven
- 11% Private Equity
- 4% Private Real Estate
- 5% Private Natural Resources

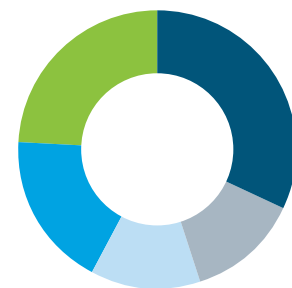
Fixed Income 34%

- 15% Credit Oriented Hedge
- 18% Fixed Income, Credit Oriented Alternatives and Cash
- 1% Israel Bonds



Purpose of Investments in the Portfolio September 2011

- 41% Stock Market Exposure
- 20% Return Enhancing
- 5% Inflation Oriented
- 34% Risk Mitigation



Liquidity Summary September 2011

- 32% Daily
- 13% Monthly
- 13% Quarterly
- 18% Annually
- 24% Illiquid

INVESTMENT PERFORMANCE THROUGH SEPTEMBER 2011								
	Total Fund	Current Month	Quarter	Year to Date	Last 12 Months	Last 3 Years	Last 5 Years	Last 10 Years
Entire Fund Total	\$104,433,075	-4.46%	-7.31%	-4.27%	2.17%	4.07%	1.44%	4.49%
Policy Index		-6.18%	-10.50%	-6.77%	-1.27%	2.54%	1.19%	5.40%
S&P 500		-7.03%	-13.87%	-8.68%	1.14%	1.23%	-1.18%	-0.60%



Create a Jewish Legacy (CJL) is an innovative program designed to transform philanthropy in this community by implementing a collaborative approach to legacy giving. Together we will build a

strong, vibrant community for generations to come. Our actions today and in the future to secure bequests for permanent endowments will ensure that our Jewish organizations continue to thrive. CJL is addressing the changing culture of legacy giving in our community by building connections among agencies, day schools and synagogues. The program is championed by CJL Co-Chairs Steve Jacobson and Mark Levitt, who are charged with building a community-wide coalition to increase awareness of legacy giving.

The program was launched with the first training session on November 10, 2011. Robert Nomberg, President & CEO of the Richmond Jewish Foundation, spoke about successes in other communities, how to get started with drafting a Planned Giving program and best practices nationally. The program is the first of its kind in this community, bringing together over 50 community members, including senior professional and lay leadership from 17 social service agencies, synagogues, community centers, Jewish day schools and other Jewish organizations.

The two-year CJL training program will be a multi-session institute bringing in nationally recognized consultants to discuss planned giving programming, community building, multi-generational issues and how to begin conversations about what has been meaningful about our Jewish experiences.

If you are interested in discussing your Jewish legacy, please contact Jennifer Smith, UJEF Philanthropic Officer, at 301-230-7211 or email Jennifer.Smith@shalomdc.org.

*Have a Happy Chanukah*

Spin the dreidel  
Fry the latkes  
Enjoy some jelly doughnuts



Upcoming Events

- Create a Jewish Legacy  
February 22, 2012
- Good Deeds Day  
March 25, 2012

Giving Tip

IRA Charitable Rollover Expires this Year

As of publication, Congress has not renewed legislation allowing direct transfers to charity of up to \$100,000 from traditional IRAs for donors age 70 ½ or older. The provision expires December 31, 2011. Directed gifts to charity from an IRA are not included in the donor's adjusted gross income for tax purposes. Distributions can be used to pay a commitment, establish an endowment or be added to an existing endowment; however, they cannot be contributed to a donor advised fund. If you are considering an IRA rollover, we can help you draft a letter to your plan administrator requesting the transfer.