



WELCOME to the 2018-2019 Board of Directors of The Jewish Federation of Greater Washington. Together, we will work to lead Federation in meaningful ways that better our community and our impact on the world. We sincerely appreciate you joining us in this important work.

Please let us know if you'd like us to add additional resource material.

We look forward to being your partners in this exciting venture!

Sincerely,

Gary Berman
CO-PRESIDENT

Gil Preuss
EXECUTIVE VICE PRESIDENT
and CEO

Board of Directors Manual

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The Jewish Federation
OF GREATER WASHINGTON

**The Jewish Federation of Greater Washington
Conflict of Interest
Annual Statement for 2018-2019**

Name: _____

In keeping with the Conflict of Interest policy of the Jewish Federation of Greater Washington, I, the undersigned, do hereby attest to the following:

- I have read and understand the Conflict of Interest Policy:
and
- Neither I nor any member of my family has in the past, is presently, or plans to engage in any activity that contravenes said policy, except as specifically noted below.
- I understand that I am under a continuing obligation to disclose promptly any potential or actual conflict of interest in writing or, if precluded due to the lack of time, orally, to the Executive Committee.

NOTE: *Fully describe any activity that contravenes the Conflict of Interest Policy. Attach additional pages, if necessary. If "none", so state.*

NOTE: *Fully describe any activity that you wish reviewed in order to determine whether or not it contravenes the Conflict of Interest Policy. Attach additional pages, if necessary. If "none", so state.*

In order for the Federation to make appropriate disclosures, please review and respond to the questions below. Attach additional pages, if necessary.¹

1. Employment, Contractual or Ownership² Interest With a 35% Controlled Company. In the past year, did you or any Person Related to you (a) possess any ownership interest in; (b) have an employment relationship with; and/or (c) have any contractual relationship with, any company or business which, to your knowledge, was a "35% Controlled Company" in which or with which any other Board member or member of Federation's Executive management also had (a) an ownership interest; (b) an employment relationship; and/or (c) a contractual relationship?

No ___ Yes ___ If yes, please indicate below the name(s) of the applicable 35% Controlled Company and briefly describe the nature of the relationship

¹ Please reference the following definitions in formulating your responses:

A **"Person Related"** shall mean, as to any person, (i) his or her spouse, parent, grandparent, child, grandchild, great-grandchild, brother, sister, aunt, uncle, first cousin, niece or nephew or the spouse of any of them, whether such relationship is natural, step-or adoptive; (ii) any member of his or her household; (iii) any other person in whom he or she has a significant personal interest; and (iv) any of his or her dependents.

A **"35% Controlled Company"** is a company or business in which members of the Federation Board of Directors or executive management of Federation and/or any family member(s) of any of the foregoing, possess, individually or in the aggregate, a 35% ownership interest (or more).

² **"Ownership"** is defined as voting power in a corporation, profits interest in a partnership, or beneficial interest in a trust.

and the other Board member(s) or executive management (including family members) who are involved:

Description: _____

2. Employment or Contractual Relationship Directly With Board Members or Executive Management as Individuals.³ In the past year, did you, or any Person Related to you, to your knowledge, have a direct contractual or employment relationship with (i) any other Board member in their individual capacity, or (ii) an individual who is part of the executive management of Federation, or any Person Related to the individuals specified in clauses (i) and (ii)?

No ___ Yes ___ If yes, please indicate below the name(s) of such Board Member(s) or executive management and/or family members and briefly describe the nature of the relationship:

Description: _____

3. Family Relationship. In the past year, were you or any person related to you, to your knowledge, a person related to (i) another Board member or (ii) any person who is part of the executive management of Federation?

No ___ Yes ___ If yes, please indicate below the name(s) of such Board Member(s) or executive management and/or family members and briefly describe the nature of the relationship:

Description: _____

The above constitutes a full and complete disclosure of all activities that either do or may contravene the Federation Conflict of Interest Policy.

(Signature)

(Date)

(Print Name)

PLEASE SUBMIT TO Sherri Deck
EMAIL: Sherri.Deck@SHALOMDC.ORG
FAX: 301.230.7270
US MAIL: 6101 EXECUTIVE BLVD, ROCKVILLE, MD 20852

³ For purposes of Question 2, "Employment or contractual relationship," does not include a relationship between an attorney and client, a medical professional (including psychologist) and patient, or a clergy and congregation.

Dates to Remember



DATES TO REMEMBER

Board of Directors Meetings

Tuesday, October 9, 2018	7:00 p.m.–9:00 p.m.	TBD NOVA
Sunday, December 9, 2018	7:00 p.m.–9:00 p.m.	Federation Conference Center
Sunday, February 10, 2019	5:00 p.m.–7:00 p.m.	TBD NOVA
Thursday, April 11, 2019	11:30 a.m.–1:30 p.m.	TBD DC
Tuesday, May 14, 2019	7:00 p.m.–9:00 p.m.	Federation Conference Center

Community Events & Travel Opportunities

JFNA General Assembly in Israel	October 22–24, 2018
Women's Philanthropy Mission to Prague & Budapest	November 4–November 11, 2018
A Special Event with Women's Philanthropy Featuring Michael Solomonov and Steven Cook	November 14, 2018
Federation's Main Event	March 14, 2019
Israel YOUR Way	March 31–April 7, 2019
Sara & Samuel J. Lessans Good Deeds Day	April 7, 2019
Annual Meeting	June 6, 2019

For the latest calendar of events and opportunities, visit shalomdc.org/events.

History of Federation



FEDERATION HISTORY

What is The Jewish Federation of Greater Washington?

In the early 1900's the American Jewish community did not exist as an organized force. As the world witnessed the devastation of Jewish life in Europe, the horrors of the Holocaust, the new phenomenon of Jews being displaced across Europe, and the unprecedented increase in the need for charitable aid, Jewish communal structures were still in their infancy. Response to these new and critical issues was often divided and leadership was timid. By the end of the 19th Century thousands of Jewish philanthropic associations were created and located on the Eastern Seaboard alone. The public began to protest the duplication of efforts, waste, and poor organization. To alleviate this chaotic situation, the Jewish Federation was created in the latter part of the 19th Century. Federation was organized, maintained and perpetuated by volunteers whose main function, in the early years, was to raise and distribute funds in an orderly and efficient manner as well as reduce the competitive fundraising and duplication of services.

Today, the Jewish Federation of Greater Washington (JFGW) is organized under the laws of Maryland as a nonprofit corporation and operates exclusively for charitable and educational purposes. Federation strives to build and sustain a purposeful and vibrant Jewish community in the Greater Washington, DC area, in Israel and throughout the world. Governance of the Federation is entrusted in a volunteer Board of Directors and Executive Committee while operations are run by a professional staff of paid employees.

The Jewish Federation of Greater Washington is one of 151 Federations and 300 Network Communities that make up the Jewish Federations of North America (JFNA). They are collectively seen as the central address of North American Jewry and thought leaders and advocates in the fields of caregiving, aging, philanthropy, disability, foreign policy, homeland security and healthcare. Together, Jewish Federations of North America are among the top 10 charities in the world, securing and managing \$16 billion in endowment assets. Each year, they collectively raise over \$900 million through annual campaigns and emergency campaigns, and distribute more than \$2 billion from foundations and endowments.

In the Greater Washington community, Federation works with its local, national and international partner agencies to identify, evaluate and address the community's most critical needs. Currently, the six most pressing areas of focus are:

- **Jewish Identity:** Increasing opportunities for meaningful connections to Jewish life to offer members of our community a multitude of ways to embark on their Jewish journey.
- **Vulnerable Populations:** Expanding services to the most vulnerable among us to meet the growing needs of at-risk populations locally, in Israel and around the world.
- **Emergency Response:** Responding swiftly to address the immediate needs of individuals and communities in crisis by delivering support, respite and relief.
- **Israel & Overseas:** Offering unwavering support for and education about Israel and 70 other Jewish communities around the world.
- **Jewish Education:** Providing accessible and affordable Jewish education to build and strengthen the Jewish community.
- **Inclusive Community:** Building a welcoming and inclusive community for all by growing the ways in which individuals are invited and encouraged to participate in Jewish life.

Federation's impact is far and wide. In partnership with 36 local, 12 national, four international agencies and 60 congregations, hundreds of programs and services are accessible and available to more than 210,000 Jewish people living across 1,500 square miles in MD, DC and Northern VA.

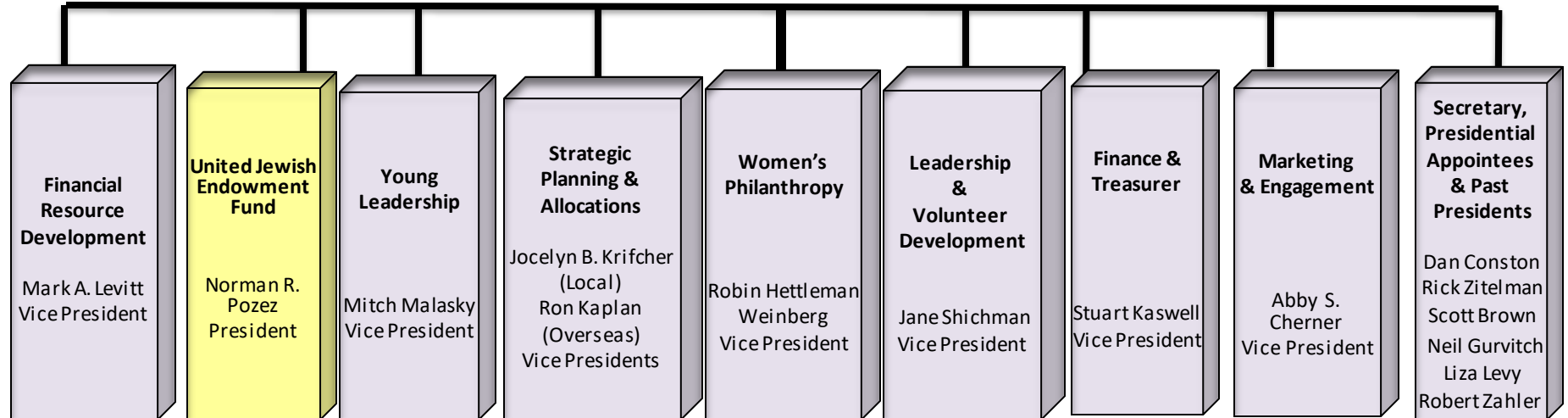
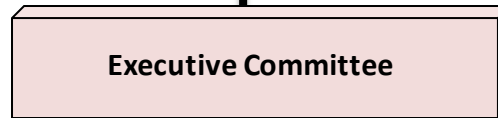
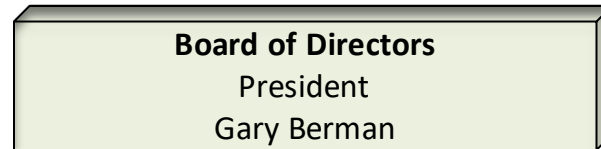
For a more detailed account of Federation's impact in Greater Washington, in Israel and around the world, please refer to the organization's community report which can be found on line at shalomdc.org/communityreport.

Lay Leader and Professional Organizational Charts

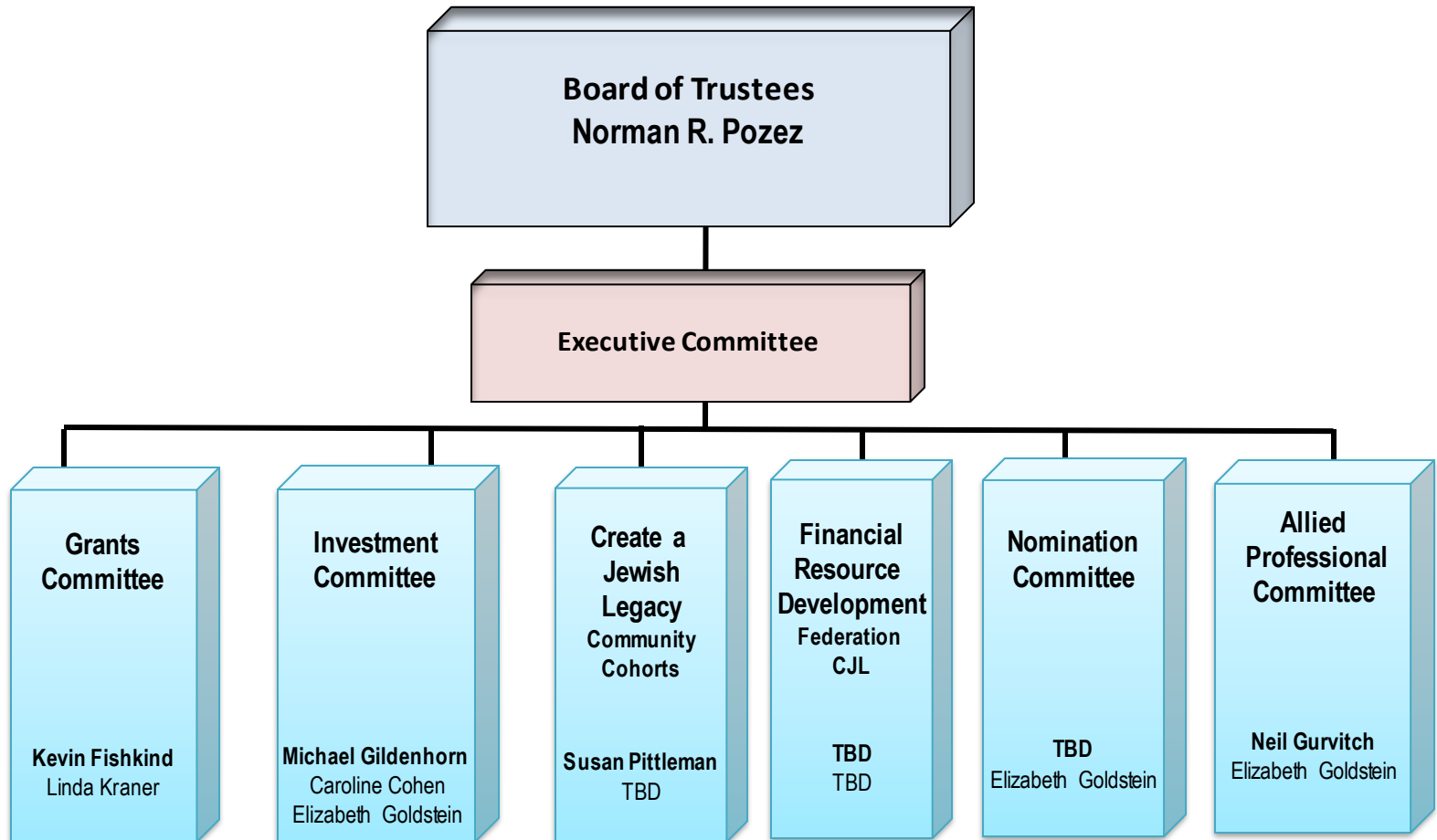
Jewish Federation of Greater Washington

Governance Organization Chart

2018-2019

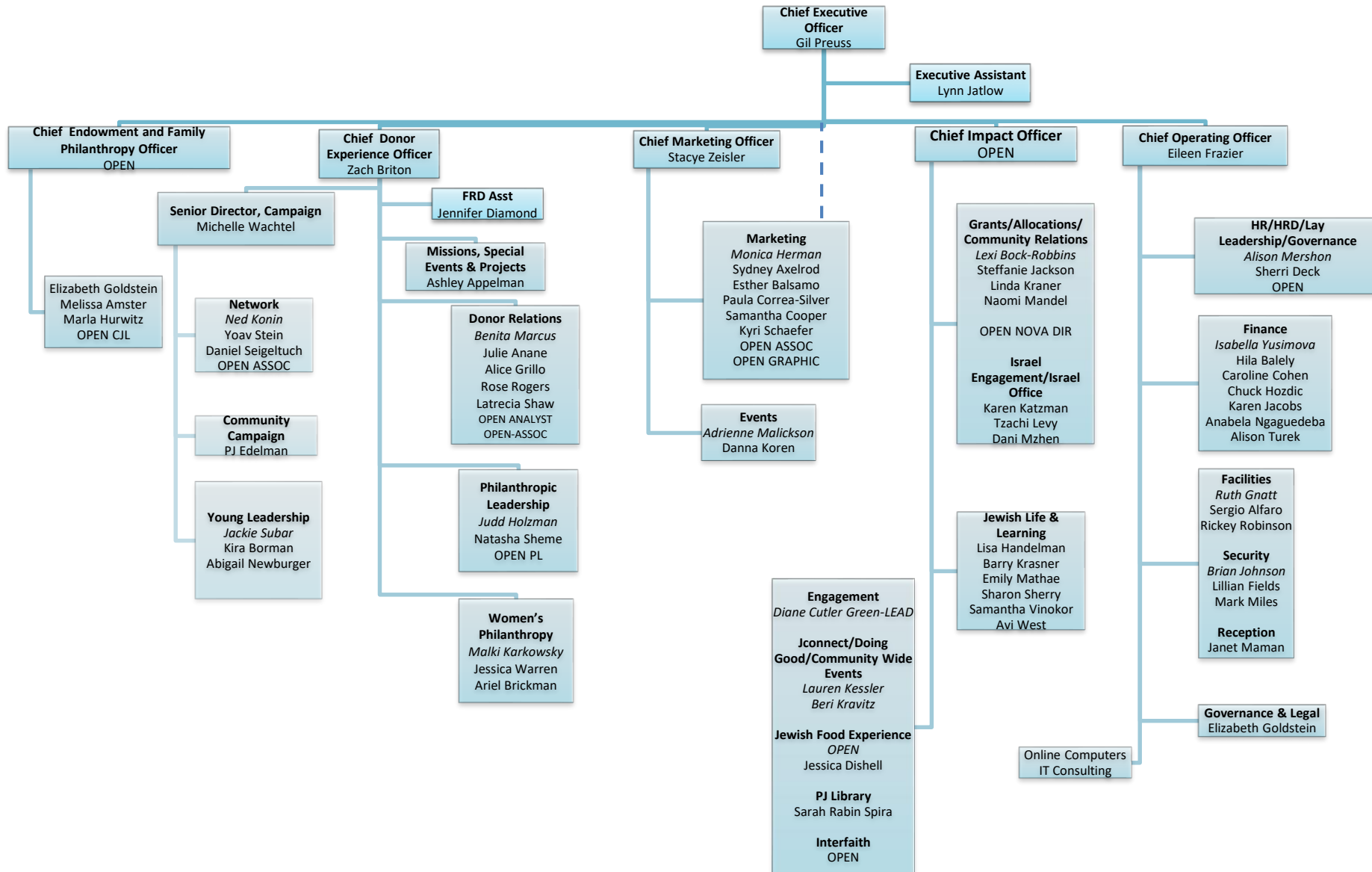


United Jewish Endowment Fund Governance Organization Chart 2018 - 2019



Federation Organizational Chart

August 2018

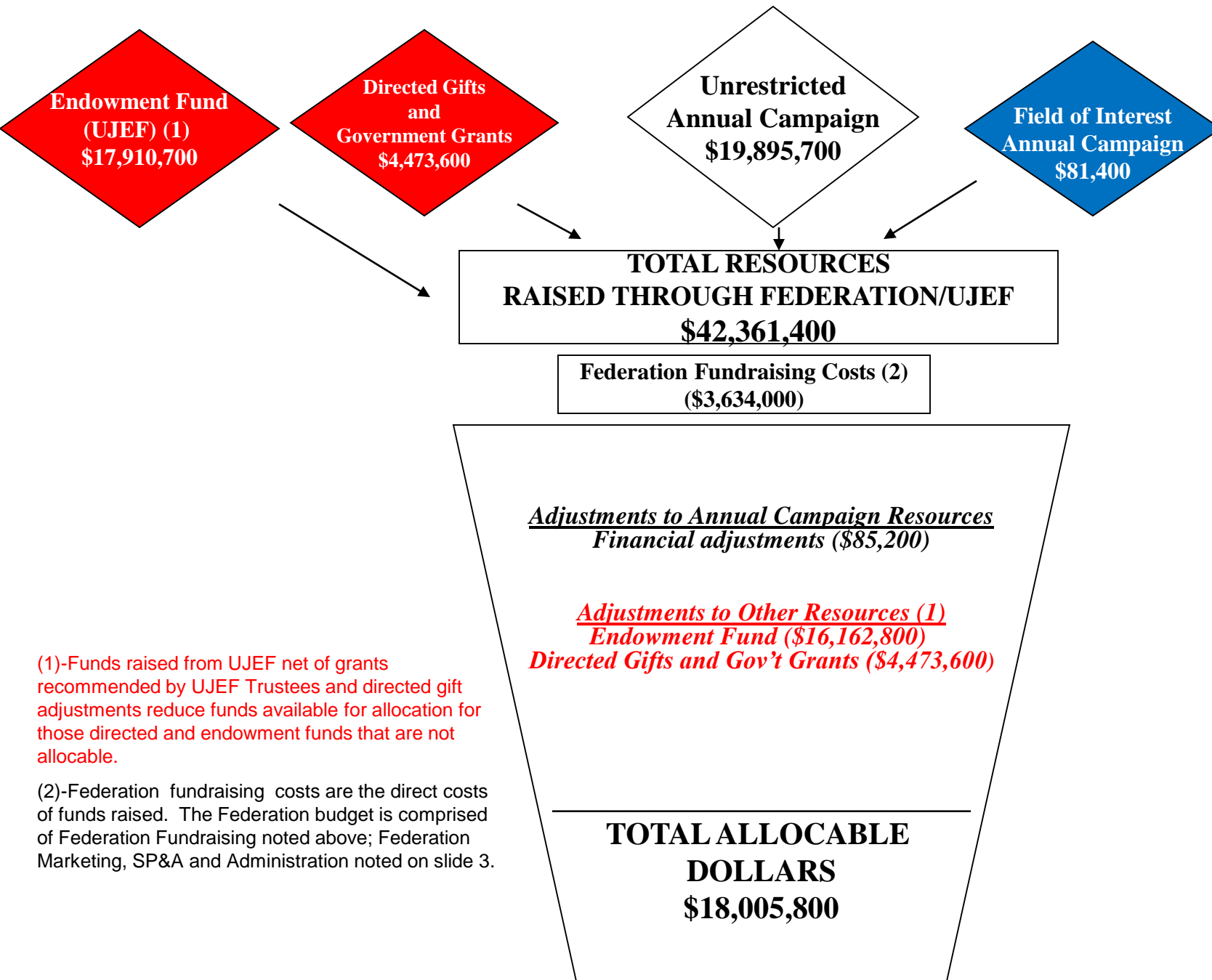


Financials and Allocations



Calendar Year 2017 Resources
&
2018/2019 Allocation Recommendations

FY17 Resources and FY 2018/2019 Allocations



(1)-Funds raised from UJEF net of grants recommended by UJEF Trustees and directed gift adjustments reduce funds available for allocation for those directed and endowment funds that are not allocable.

(2)-Federation fundraising costs are the direct costs of funds raised. The Federation budget is comprised of Federation Fundraising noted above; Federation Marketing, SP&A and Administration noted on slide 3.

Executive Committee Recommendation from ALLOCABLE Resources for FY18/19

(From 2017 Annual Campaign, Field of Interest and UJEF Resources)
(in thousands of dollars)

	<u>2017 AC/FOI Allocations</u>	<u>2017 UJEF Grants</u>	<u>2017 Allocations & Grants</u>
Local Allocations	\$7,176.8	\$991.3	\$8,168.1
Israel & Overseas Allocations	\$4,197.2	\$756.6	\$4,953.8
National Allocations	\$1,212.2	\$0.0	\$1,212.2
Total Allocations	\$12,586.2	\$1,747.9	\$14,334.1
Federation Administration (1)	\$2,683.0	\$0.0	\$2,683.0
Federation Community Programming/Outreach (1)	\$988.7	\$0.0	\$988.7
Total ALLOCABLE Resources	\$16,257.9	\$1,747.9	\$18,005.8

(1) Federation internal budget comprised of fundraising costs noted on slide 2 plus Federation administration and Federation community programming & outreach on this slide. Total internal budget funding proposed from allocable funds is \$7,305,700 which is \$174,400 greater than the prior year.

Internal Budget Recommendation

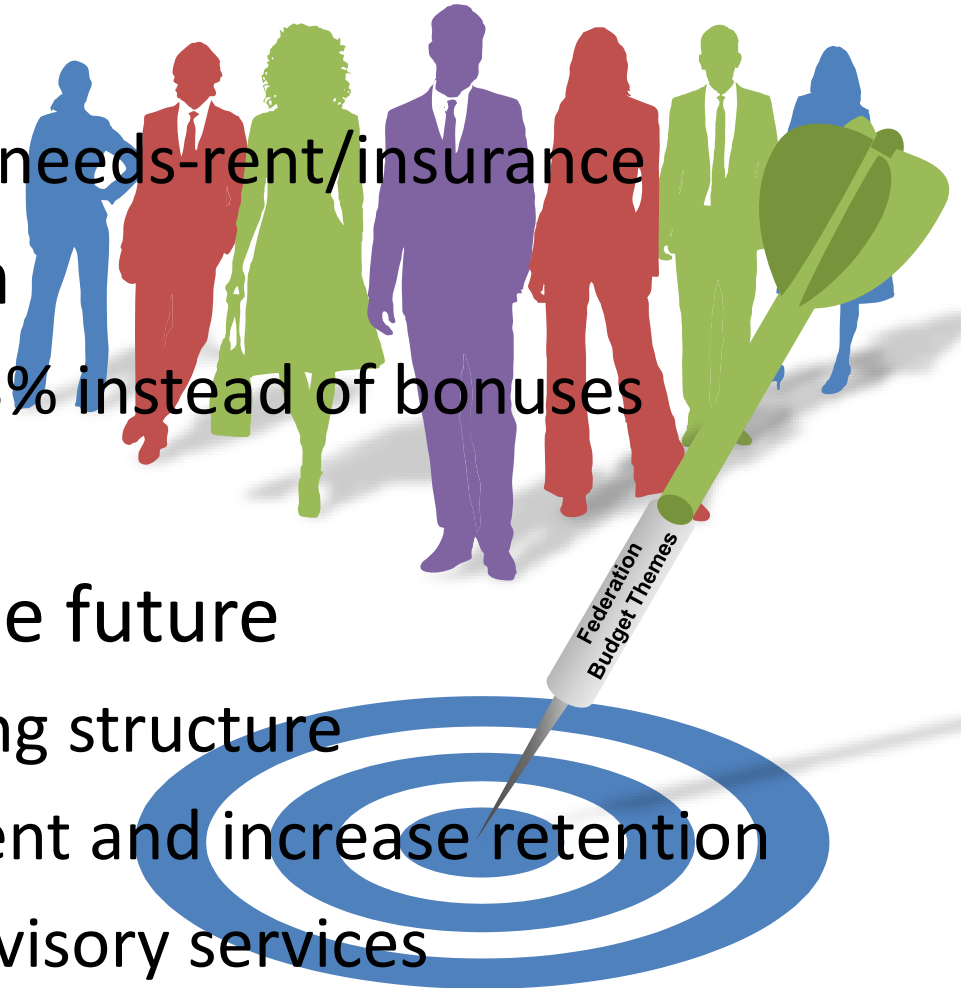
Summary

- Net increase in Federation's internal budget by the \$174,400 recommended by the Executive Committee
- Continued rollover over of special FRD set asides of \$175,000
- Confirmation of reduction of holdback from 2.5% to 2% with study in future to possibly reduce further



Overall Budget Themes

- Stability
 - Meeting organizational needs-rent/insurance
- Investment in the Team
 - Merit increase pool of 3% instead of bonuses
 - Investment in NOVA
- Invest in capacity for the future
 - Investment in fundraising structure
 - Expand staff development and increase retention
 - Create philanthropic advisory services
 - SP&A support of fundraising
 - Restructure of governance & leadership



Budget Summary

Funds Available and Recommendations for Funding-Incremental Increases in Budget

Source of Funds-\$401,400

Changes in Assumptions to Create Addl Budget Funds

- Funds available recommended by EC of including confirmation of holdback reduction from 2.5% to 2% of **\$174,400**
- Additional funds available from UJEF fees of **\$94,000**
- Reorient budget funding for Jewish Leadership Institute to focus on leadership development at a savings of **\$70,000**
- Adjust assumed savings for projections based on historical averages to 3.0% to an adjustment of **\$43,000**
- Reduction in defined contribution retirement plan costs for plan forfeitures not previously budgeted of **\$20,000**



Use of Funds-\$401,400

Necessary Additions & Investments

- Salary increase for team at 3% for a cost of **\$191,400**
- Investment in a NOVA team member position at **\$100,000**
- Increase in rental costs of **\$50,000**
 - Minimum recommended to Finance Committee by Executive Committee at their January meeting
- Assumed health insurance increase at 12% of **\$40,000**
 - Will work with broker to keep increase as low as possible
- Additional investment of **\$20,000** in mission subsidies and missions program support

Allocations Overview

1. Maintain partner agency core allocations at the current funding for the Fiscal Year 2019
2. Apply incremental increases in campaign allocable resources towards community funding priorities (slides 8-9)

\$	12,129,100	Maintain base allocations to Local, Israel & Overseas and National
\$	375,700	Increase in unrestricted allocable dollars
\$	<u>81,400</u>	Increase – donor restricted to adult education and shlichim program
\$	12,586,200	Total FY19 Allocations

Local Priority Areas

Funds Available and Recommendations for Funding-Incremental Increases towards Community Priorities

Source of Funds - \$372,000

- **\$302,000** increase to Local Allocations
 - \$277,000 unrestricted + \$25,000 restricted
- **\$70,000** redistribution of one-time local funding

Use of Funds - \$372,000

- **\$147,000** Engaging Families with Young Children
 - ✓ PJ Library \$72,000
 - ✓ Jfamily Ambassadors \$75,000
- **\$100,000** Welcoming Interfaith Families/Couples
 - ✓ Interfaith Initiatives Grant Pool
- **\$50,000** Jewish Overnight Camping
 - ✓ One Happy Camper
- **\$25,000** Teens and College Students
 - ✓ Youth Groups
- **\$25,000** Inclusion of individuals with disabilities
 - ✓ Sulam
- **\$25,000** Adult Learning

Israel & Overseas Priority Areas

Funds Available and Recommendations for Funding-Incremental Increases towards Community Priorities

Source of Funds - \$264,200

- **\$155,100** increase to I&O Allocations
 - \$98,700 unrestricted + \$56,400 restricted
- **\$109,100** redistribution of I&O funding
 - \$90,000 redistributed within JDC
 - \$19,100 redistributed within Zinman Matnas

Use of Funds - \$264,200

- **\$138,700** Strengthening Israeli Society through Social Change
 - ✓ JDC-LGBTQ Capacity Building Prog \$40,000
 - ✓ Israel Gay Youth \$38,700
 - ✓ Israel Hofsheets \$40,000
 - ✓ JAFI-AmiUnity-Pluralism Training \$20,000
- **\$56,400** Congregational Shlichim
- **\$50,000** Strengthening the Vibrancy of Jewish Life Overseas (outside Israel)
 - ✓ JDC-Camping in the Baltics
- **\$19,100** Programs at the Zinman Matnas

UJEF Grants Overview

1. Continuing support of programing for teens in our local community
2. New funding for Adult Education initiatives
3. In Israel, support of intentional communities and programs that inspire young adults to invest and grow those communities

	<u>UJEF Grants</u>
Local	\$991.3
Israel & Overseas	<u>\$756.6</u>
Total UJEF Grants Recommended	<u>\$1,747.9</u>

UJEF Local Priority Areas

Source of Funds - \$992,100

- **\$774,900** Unrestricted grants pool, rollover funds and emergency use funds
- **\$144,400** Kaufmann and other funds for the elderly/vulnerable populations
- **\$51,300** Fisher Elderly Housing Funds
- **\$21,500** Taub Memorial & Shultz Continuity Funds

Use of Funds - \$991,300

- **\$175,300** Teens
 - ✓ JSU: NOVA Expansion \$50,000
 - ✓ BBYO Impact L'Atid \$50,000
 - ✓ Jteen Philanthropy Expansion \$40,000
 - ✓ JCRC Student to Student \$35,300
- **\$192,000** Families with young children
 - ✓ JCCNV Jfamily Ambassadors expansion in NOVA \$92,000
 - ✓ Jfamily Ambassadors expansion \$100,000
- **\$185,000** Adult learning
- **\$144,400** Aging and elderly services
 - ✓ JCCNV/JSSA/JCA-Coming of age in NOVA \$82,400
 - ✓ Edlavitch DC JCC Behrend-Adas Senior Fellowship \$30,100
 - ✓ Bender JCC Services for Frail Elderly \$19,300
 - ✓ JSSA Coming of Age in Maryland \$12,700
- **\$130,000** Engagement programs
 - ✓ Honeymoon Israel \$80,000
 - ✓ Jewish Food Experience \$50,000
- **\$80,000** Matching grants program
- **\$51,300** Housing for the elderly
- **\$33,300** Emergency Fund replenishment

Note: \$800 of funds available were not recommended to be granted this fiscal year.

UJEF Israel & Overseas Priority Areas

Source of Funds - \$868,100

- **\$688,100** Grants pool and rollover funds
- **\$93,400** Emergency Assistance Fund for Elderly in the Ukraine
- **\$67,900** Seldowitz Fund-Services for children with cancer/disabilities
- **\$7,200** Emergency needs in Israel funds
- **\$6,500** Post IDF funds
- **\$5,000** Immigrants to Israel funds

Use of Funds - \$756,600

- **\$290,000** Intentional Communities
 - ✓ Shahaf Foundation Investment Fund \$150,000
 - ✓ Eretz Ir Community Network Development \$50,000
 - ✓ Totzeret Ha'aretz Intentional Community Network \$50,000
 - ✓ Tarbut Culture Policy Leadership \$40,000
- **\$290,000** Teens in Israel
 - ✓ Israel Council Youth Movements-Future Generation \$150,000
 - ✓ Dror Israel-Educating for Tomorrow \$140,000
- **\$93,400** Emergency Assistance Fund for Elderly in the Ukraine-JDC
- **\$61,900** Services for children with cancer or disabilities in Israel
 - ✓ Shutfim inclusion program \$30,000
 - ✓ Sunrise Summer Day Camp \$20,000
 - ✓ Shalva Mommy & Me \$11,900
- **\$21,300** Other
 - ✓ Mahalach Foundation \$11,300
 - ✓ Israel Exploratory Trip \$10,000

Note: \$105,500 of funds available from the grants pool and rollover funds were not recommended to be granted at this time and \$6,000 from the Seldowitz Fund were not recommended to be granted this fiscal year for a total of \$111,500.



The Jewish Federation
OF GREATER WASHINGTON

Appendix Charts

Summary of ALLOCABLE Campaign Resources

(in thousands of dollars)

	<u>2017</u>	<u>2016</u>	<u>Diff.</u>
ALLOCABLE Resources (collected)			
Unrestricted Annual Campaign	\$19,895.7	\$19,521.3	\$374.4
Field of Interest Campaign	<u>\$81.4</u>	<u>\$0.0</u>	<u>\$81.4</u>
Total Allocable Campaign Resources	\$19,977.1	\$19,521.3	\$455.8

Reconciliation of Annual Campaign (UR/FOI)

ALLOCABLE Resources to Funds Available for Allocation

(in thousands of dollars)

	<u>2017</u>	<u>2016</u>	<u>Diff.</u>
Total Annual Campaign Allocable Resources	\$19,977.1	\$19,521.3	\$455.8
Fundraising Costs	(\$3,634.0)	(\$3,487.4)	\$146.6
Total NET Annual Campaign Allocable Resources	\$16,343.1	\$16,033.9	\$309.2
Financial Adjustments to Resources			
Net: Investment income, investment expenses, credit card fees, etc	(\$143.5)	(\$141.2)	(\$2.3)
Other financial adjustments (1)	\$475.0	\$445.0	\$30.0
Funding for Emergency Fund at UJEF (Hurricane Harvey reimbursement)	(\$16.7)	(\$31.7)	\$15.0
Holdback reserve adjustment from campaign resources (2)	(\$400.0)	(\$488.0)	\$88.0
Reserve set aside for future use	\$0.0	\$30.0	(\$30.0)
Total ALLOCABLE resources before change in assumptions	(\$85.2)	(\$185.9)	\$100.75
Total Allocable Funds from UR Annual Campaign and Field of Interest Funds	<u>\$16,257.9</u>	<u>\$15,848.0</u>	<u>\$409.9</u>

- 1) Change in financial adjustments relates to the reduction in UJEF direct allocable dollars funding by \$30k. Federation is no longer using allocable funds to cover UJEF's budget. Includes UJEF budget reimbursement in 2016, estate credit, Defined Benefit plan, prospecting.
- 2) For 2016, reserve percentage was 2.5%. Based on increased collection rates, for 2017, reserve was reduced to 2%.

Endowment Fund Receipts

Explanation of Fund Types

(in thousands of dollars)

	Total 2017	Total 2016
Donor Designated, General, Field of Interest, PACE/LOJE - Permanent Funds	\$3,542.4	\$1,650.5
Annuity Funds- Permanent Funds	\$55.4	\$0.0
Donor Advised Funds	\$12,448.8	\$19,312.6
Agency Funds	\$549.7	\$860.9
Fees Revenue	\$1,314.4	\$1,173.6
TOTAL	<u>\$17,910.7</u>	<u>\$22,997.6</u>

Local Allocations Recommendation

Local Agency/Program	A FY18 Allocations	B FY19 Changes	C FY19 Total Allocations	D 2017 Donor Designated Gifts
Bender JCC of Greater Washington	\$ 774,063		\$ 774,063	\$ 119,500
Campuses/Hillels (see detail for campus allocations)	\$ 232,027		\$ 232,027	\$ 2,500
Capital Camps and Retreat Center (CCRC)	\$ 120,078		\$ 120,078	\$ 10,000
Day Schools (see detail for school allocations)	\$ 1,351,951		\$ 1,351,951	
Edlavitch JCC of Washington DC (EDCJCC)	\$ 399,432		\$ 399,432	\$ 63,335
Jewish Coalition Against Domestic Abuse (JCADA)	\$ 49,719		\$ 49,719	
Jewish Community Center of Northern Virginia (JCCNV)	\$ 326,607		\$ 326,607	
Jewish Community Relations Council (JCRC)	\$ 603,013		\$ 603,013	\$ 14,794
Jewish Council for the Aging (JCA)	\$ 299,884		\$ 299,884	\$ 1,000
Jewish Foundation for Group Homes (JFGH)	\$ 189,104		\$ 189,104	\$ 7,000
Jewish Historical Society of Greater Washington	\$ 30,000		\$ 30,000	\$ 6,650
Jewish Social Service Agency (JSSA)	\$ 949,830		\$ 949,830	\$ 448,277
Moishe House	\$ 25,000		\$ 25,000	
Sulam		\$ 25,000	\$ 25,000	
Youth Group Grants (1)	\$ 58,236	\$ 25,000	\$ 83,236	
Community Projects				
Adult Education		\$ 25,000	\$ 25,000	
Campus Security	\$ 354,952		\$ 354,952	\$ 24,961
Coming of Age MD	\$ 7,672		\$ 7,672	\$ 272,648
Coming of Age VA	\$ 19,530		\$ 19,530	
Federation's Department of Jewish Life & Learning	\$ 546,040		\$ 546,040	\$ 285,740
Federation's Jconnect	\$ 236,773		\$ 236,773	\$ 599
Federation's Jewish Food Experience	\$ 30,000		\$ 30,000	\$ 32,254
Initiative in Congregational Education	\$ 55,957		\$ 55,957	
InterfaithFamily/DC	\$ 70,000	\$ (70,000)	\$ -	\$ 1,000
Interfaith Initiatives Grants Pool		\$ 100,000	\$ 100,000	
Israel Engagement	\$ 51,892		\$ 51,892	\$ 1,650
Israel Quest	\$ 20,868		\$ 20,868	
JFamily Ambassadors (2)		\$ 75,000	\$ 75,000	
Repayment of JLL Loan (3)	\$ 75,000	\$ (75,000)	\$ -	
One Happy Camper (4)	\$ 47,186	\$ 50,000	\$ 97,186	\$ 15,000
PJ Library	\$ 25,000	\$ 72,000	\$ 97,000	\$ 195,160
Donor Designated Gifts				
Addiction Prevention and Recovery Program				\$ 15,000
Events and Sponsorships				\$ 624,376
Good Deeds Day				\$ 22,002
Grand Slam Sunday				\$ 12,000
Jewish Millennial Engagement Project				\$ 37,175
Jewish Women's Renaissance Project				\$ 20,000
Sunflower Bakery & Café				\$ 10,000
Teen Israel Engagement Fellowship				\$ 25,473
Tikkun Olam Women's Foundation				\$ 179,380
Young Adult & Birthright Follow Up				\$ 165,607
Other Designated Gifts				\$ 2,698
TOTAL LOCAL ALLOCATIONS	\$ 6,949,815	\$ 227,000	\$ 7,176,815	\$ 2,615,779

I&O Allocations Recommendation

	A	B	C	D
Overseas Partners and Programs	FY18 Allocations	FY19 Changes	FY19 Total Allocations	2017 Donor Designated Gifts
American Jewish Joint Distribution Committee (JDC) (1)	\$ 375,724	\$ -	\$ 375,724	\$ 37,900
PACT Afula	\$ 80,000	\$ (80,000)	\$ -	
Welfare Relief, Moscow	\$ 25,000		\$ 25,000	
Incorporate Israel	\$ 40,000	\$ (10,000)	\$ 30,000	
Camping in the Baltics	\$ 63,500	\$ 50,000	\$ 113,500	
LGBTQ Capacity Building Program		\$ 40,000	\$ 40,000	
JDC Unrestricted Allocation (balance)	\$ 167,224		\$ 167,224	\$ 26,900
LGBT Mapping Initiative				\$ 11,000
Imagine Israel	\$ 212,820		\$ 212,820	
Israel Gay Youth		\$ 38,700	\$ 38,700	
Israel Hofsheet		\$ 40,000	\$ 40,000	
Israel Religious Expressions Platform (iRep)	\$ 25,000		\$ 25,000	
Jewish Agency for Israel (JAFI)	\$ 252,098	\$ 20,000	\$ 272,098	\$ 1,115,350
Federation Community Shaliach	\$ 131,000		\$ 131,000	
AmiUnity - Pluralism Training		\$ 20,000	\$ 20,000	
Youth Futures Afula	\$ 111,180		\$ 111,180	
Jewish Agency Unrestricted (balance)	\$ 9,918		\$ 9,918	\$ 54,100
Alma Derech Eretz				\$ 6,250
Atidim				\$ 1,000,000
MASA				\$ 37,500
Ofek Mechinot				\$ 10,000
St. Petersburg Summer Camp				\$ 7,500
Network of Community Centers in Beit Shemesh / Zinman Matnas (2)	\$ 135,132	\$ -	\$ 135,132	\$ 12,000
Empowerment Program	\$ 19,132	\$ (19,132)	\$ -	
Culinary & Healthy Food Program		\$ 9,132	\$ 9,132	
Teen Leadership & IDF Training Program		\$ 10,000	\$ 10,000	
Inya Linya/ Scholastic Assistance Program	\$ 46,000		\$ 46,000	
Youth Outreach Centers	\$ 70,000		\$ 70,000	\$ 12,000
Social Venture Fund for Jewish-Arab Equality and Shared Society	\$ 50,000		\$ 50,000	\$ 25,000
World ORT	\$ 19,568		\$ 19,568	
JFNA Overseas Core Allocation (Balance)	\$ 2,971,758	\$ 56,400	\$ 3,028,158	\$ -
Unrestricted Core	\$ 2,721,758	\$ (130,000)	\$ 2,591,758	
Directed to Congregational Shlichim program, JAFI (3)	\$ 250,000	\$ 186,400	\$ 436,400	
Other Donor Designated Gifts				\$ 105,085
American Friends of Herzog Hospital				\$ 43,000
Bialik Rogozin School				\$ 5,000
Garin Ometz Akko				\$ 12,085
Israel Venture Network				\$ 40,000
Ruach Hadasha				\$ 5,000
	\$ 4,042,100	\$ 155,100	\$ 4,197,200	\$ 1,295,335

National Allocations Recommendation

	A	C	D
National Partners and Programs	FY 18 Allocations	FY 19 Allocations	2017 Donor Designated Gifts
Jewish Federations of North America (JFNA)	\$ 1,036,000	\$ 1,036,000	\$ 562,517
Fair Share/JFNA dues estimated	\$ 756,000	\$ 756,000	\$ 23,000
Israel Office	\$ 73,000	\$ 73,000	\$ 32,580
Birthright Israel Fair Share	\$ 207,000	\$ 207,000	\$ 41,300
National Alliance (1)	\$ 141,700	\$ 141,700	
Dues	\$ 10,800	tbd	
Allocation to Partners listed below	\$ 130,900	tbd	
Additional Initiatives of Interest to Washington	\$ 34,500	\$ 34,500	
Inter Agency Task Force on Israeli Arab Issues (JDC)	\$ 5,000	\$ 5,000	
Israel Action Network	\$ 27,000	\$ 27,000	
JPRO Network	\$ 2,500	\$ 2,500	
Total Allocation	\$ 1,212,200	\$ 1,212,200	\$ 562,517

Note: (1) The National Alliance is dissolving at the end of FY18. SP&A has established a task force to determine recommendations for the reallocation of the \$141,700 among national agencies. These recommendations will be completed by early-mid summer.

National Alliance Partner Organizations
70 Faces Media (JTA)
American Jewish World Service
BBYO
The Hebrew Immigrant Aid Society
Hillel: The Foundation for Jewish Campus Life
The Jewish Community Centers Association of North America
The Jewish Council for Public Affairs
JFNA Education and Engagement Unit
NCSEJ: National Coalition Supporting Eurasian Jewry
Network of Jewish Human Service Agencies

UJEF Grants Recommendation

Local Grants Recommended		
Organization Name	Project/Purpose	Recommended Funding
Atlantic Seaboard NCSY	JSU: NOVA Expansion	\$50,000
Bender JCC	Services for frail elderly at Har Tzeon	\$19,290
B'nai B'rith Youth Organization	Impact L'Atid	\$50,000
Edlavitch DC Jewish Community Center	Behrend-Adas Senior Fellowship	\$30,062
Eldery Housing	Proposals still in process	\$51,260
Honeymoon Israel	Pre/Post Programming for Participants	\$80,000
Jewish Community Relations Council	Student to Student	\$35,268
Jewish Community Center of Northern Virginia	jfamily Ambassadors	\$92,000
Jewish Commtty Ctr of NOVA/Jewish Social Service Agency/Jewish Council for the Aging	Coming of Age in Northern VA	\$82,352
Jewish Federation of Greater Washington	Adult Learning	\$185,000
Jewish Federation of Greater Washington	jfamily Ambassadors expansion	\$100,000
Jewish Federation of Greater Washington	Jteen Philanthropy Expansion	\$40,000
Jewish Federation of Greater Washington	Replenishment of Emergency Funds	\$33,333
Jewish Food Experience	Montetizing the JFE program/website	\$50,000
Jewish Social Service Agency	Coming of Age in Maryland	\$12,738
UJEF Grants Committee	Matching Gifts Program	\$80,000
	Total Local Grants Recommended	\$991,303
Israel & Overseas Grants Recommended		
Organization Name	Project/Purpose	Recommended Funding
American Jewish Joint Distribution Committee (JDC)	Imperished Elderly in Odessa	\$93,459
Dror Israel	Educating for Tomorrow	\$140,000
Eretz Ir	Community Network Development	\$50,000
Israeli Council on Youth Movements	Future Generation	\$150,000
Mahalach Foundation	Nonprofit Development	\$11,300
United Jewish Endowment Fund	Israel Exploratory Trip, 10/17	\$10,000
Shahaf Foundation	Investment Fund	\$150,000
Shalva	Me & My Mommy	\$11,870
Sunrise	Summer Day Camp for Children with Cancer and their Siblings	\$20,000
Shutafim	Inclusion Program: Camps/Afterschool programs for children w/disabilities	\$30,000
Tarbut	Culture Policy Leadership	\$40,000
Totzeret Ha'aretz	Intentional Communities Network	\$50,000
	Total Israel & Overseas Grants	\$756,629
	TOTAL TO GRANT IN FY18	\$1,747,932

Budget Recommendation

Department	FYE June 2018-APPROVED Budget					FYE June 2019-PROPOSED Budget				
	Revenue Sponsorships Cover Charges*	Non-Salary	Net Non-Salary Budget	Salary & Benefits (pages 4-5)	Net Budget	Revenue Sponsorships Cover Charges*	Non-Salary	Net Non-Salary Budget	Salary & Benefits (pages 4-5)	Net Budget
Fundraising-Annual Campaign(s) All Divisions including event staffing (pages 6-7)	\$272,000	\$835,300	\$563,300	\$2,321,900	\$2,885,200	\$272,000	\$865,300	\$593,300	\$2,421,900	\$3,015,200
Planned Giving/Endowment Fund (pages 8-10)	\$155,000	\$414,000	\$259,000	\$1,142,900	\$1,401,900	\$155,000	\$414,000	\$259,000	\$1,142,900	\$1,401,900
Rollover Funding for FRD events and programs (page 2)	\$0	\$175,000	\$175,000	\$0	\$175,000	\$0	\$175,000	\$175,000	\$0	\$175,000
Total Fundraising Costs	\$427,000	\$1,424,300	\$997,300	\$3,464,800	\$4,462,100	\$427,000	\$1,454,300	\$1,027,300	\$3,564,800	\$4,592,100
Marketing, Events & Special Programs (pages 10-12)	\$15,000	\$194,000	\$179,000	\$604,300	\$783,300	\$15,000	\$194,000	\$179,000	\$604,300	\$783,300
CGI/SP&A (page13-14)	\$0	\$45,500	\$45,500	\$393,100	\$438,600	\$0	\$45,500	\$45,500	\$393,100	\$438,600
Facilities, Conference Center, Finance and IT (pages 14-15)	\$100,850	\$554,400	\$453,550	\$760,300	\$1,213,850	\$100,850	\$554,400	\$453,550	\$760,300	\$1,213,850
Executive Office, Leadership, Governance and HR (pages 12-13)	\$0	\$291,350	\$291,350	\$850,800	\$1,142,150	\$0	\$241,350	\$241,350	\$850,800	\$1,092,150
Allocated Costs Including Depreciation (pages 14-15)	\$65,000	\$537,300	\$472,300	\$0	\$472,300	\$65,000	\$587,300	\$522,300	\$0	\$522,300
Net Increase in Salaries/Fringe Budget excluding new positions (pages 1-5)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$138,400	\$138,400
Total Federation and UJEF Costs	\$607,850	\$3,046,850	\$2,439,000	\$6,073,300	\$8,512,300	\$607,850	\$3,076,850	\$2,469,000	\$6,311,700	\$8,780,700
FUNDING SOURCES										
Federation Internal budget					\$7,131,300					\$7,305,700
Rollover Funding					\$175,000					\$175,000
Allocable dollars set aside for UJEF Funding					\$30,000					\$0
UJEF Funding from Fees					\$1,176,000					\$1,300,000
Total Funding Sources					\$8,512,300					\$8,780,700

*-Cover charges/sponsorships based historical actual averages from FY16 and FY17



The Jewish Federation of Greater Washington

FY19 Annual Campaign Allocations Report

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Overview of FY19 Allocations

In October 2017, the Executive Committee approved, pending a flat or increased Annual Campaign, to:

- Maintain our partner agency core allocations at the current funding for the Fiscal Year 2019 (July 1, 2018 – June 30, 2019);
- Apply any Annual Campaign increases towards SP&A identified community funding priorities (page 7);
- Allow donors to give increased directed gifts to specific funding priority areas as discussed and approved by SP&A in the fall.

Per approval at the Executive Committee meeting in March, core allocations to Federation's local and Israel & Overseas partners are being held level for FY19, and thanks to a successful campaign, the Strategic Planning & Allocations Committee (SP&A) developed recommendations for the allocation of Annual Campaign increases to the funding priority areas.

Summary of Annual Campaign Resources to be Allocated

Funds Allocated Locally in FY18	\$ 6,949,815
Increase to Local Allocations (\$277k unrestricted + \$25k restricted)	\$ 302,000
Reduction of PJLL loan repayment	\$ (75,000)
Local Allocation Recommendations FY19	<u>\$ 7,176,815</u>

Funds Allocation to Israel & Overseas in FY18	\$ 4,042,100
Increase to I&O Allocations (\$98.7k unrestricted + \$56.4k restricted)	\$ 155,100
Israel & Overseas Allocation Recommendations FY19	<u>\$ 4,197,200</u>

Funds Allocation to National Needs in FY18	\$ 1,212,200
Increase to National Allocations	\$ 0
National Allocation Recommendations FY19	<u>\$ 1,212,200</u>

Total FY19 Annual Campaign Allocations	<u>\$ 12,586,215</u>
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2017 Donor Designated Gifts (reported for information only)	<u>\$ 4,473,631</u>
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Details of FY19 Allocations

FY19 Local Allocations

The base allocation to each local partner is unrestricted for its use in addressing its priorities.

In line with the community funding priorities (page 7), the following adjustments to allocations are recommended:

- Conclusion of the Partnership for Jewish Life and Learning loan repayment, as the loan has now been fully repaid.
- A \$30,000 grant to Federation's Jewish Food Experience.
- Sulam is added as a new partner agency of Federation with a base allocation of \$25,000. Sulam approached Federation over the summer with a request to become a partner agency. After being thoroughly reviewed by an SP&A special task force, it was recommended that Federation approve Sulam as a partner agency pending available dollars for a meaningful allocation. SP&A recommends \$25,000 as a meaningful base allocation. **(Priority Area: Inclusion of Individuals with Disabilities)**
- BBYO is granted an allocation of \$25,000 to expand its activities in Northern Virginia. SP&A recommends this allocation in response to findings about the tremendous growth of the Jewish community in Northern Virginia. BBYO is the largest youth group in the Washington region, with over 1,500 teens participating locally, and is the youth group with the strongest local capacity for expansion. **(Priority Area: Strengthening Jewish Identity Among Teens)**
- Instead of an allocation to InterfaithFamily/DC, \$100,000 is allocated to the establishment of an Interfaith Initiatives Grants Pool, which will be operated by the Interfaith Committee in Federation's Engagement department. The grants pool will promote interfaith engagement initiatives across the community by providing grants to organizations – Federation's partners, synagogues, and other organizations – to support initiatives welcoming interfaith couples and families to the Jewish community. **(Priority Area: Welcoming Interfaith Couples and Families)**
- JFamily Ambassadors is granted an allocation of \$75,000 to expand the program into DC and Montgomery County. JFamily Ambassadors is currently operating at the JCC of Northern Virginia and engages young families with small children who otherwise would not be accessing Jewish community, using a model of "ambassadors" who meet 1-on-1 with families and connect them with peers and local groups. The FY19 allocation will enable the expansion of this successful model to DC and Montgomery County. **(Priority Area: Engaging Families with Young Children)**
- One Happy Camper is granted an increase of \$50,000, to provide campership grants to families in Northern Virginia. The One Happy Camper program has reached capacity and every year "sells" out within a week of opening. In response to findings about the tremendous growth of the Northern Virginia Jewish community, SP&A recommends the expansion of the program to

target both Northern Virginia families and to more broadly target families who are generally less affiliated with Jewish institutions. **(Priority Area: Jewish Overnight Camping)**

- PJ Library is granted a \$72,000 increase to its base allocation as it transitions from its original funding model of Endowment grant/donor directed funding to increased funding from the Annual Campaign. **(Priority Area: Engaging Families with Young Children)**

FY19 Israel & Overseas Allocations

The overseas Core remains the same as last year at \$2,971,758.

The identified priority areas for Israel & Overseas are **Strengthening Israeli Society Through Social Change** and **Strengthening the Vibrancy of Jewish Life Overseas (outside Israel)**. These priorities are further described on pages 7-8. Strengthening Israeli Society Through Social Change enables Federation to better align our allocations portfolio with our Israel engagement strategy through Imagine Israel, which seeks to connect Washingtonians with Israel and Israelis through the lens of social change. Our involvement in Strengthening the Vibrancy of Jewish Life Overseas (outside Israel) began during the last allocations process with our initial funding of JDC's Camping in the Baltics initiative that we began funding in FY18.

In line with these funding priorities, the following adjustments to Israel and Overseas allocations are recommended:

- \$19,132 in funds allocated to the Zinman Matnas are available to reallocate to other programs at Zinman. Since the Youth Outreach Center and the Scholastic Assistance program have moved to the Zinman Matnas, the Empowerment Program is no longer active. SP&A recommends that these funds be reallocated within Zinman as follows:
 - \$10,000 for a Teen Leadership and IDF Training program. The Teen Leadership and IDF Training Program at Zinman's Youth Outreach Center provides the teens at the community center – mainly Ethiopian-Israeli, and many at-risk – with the tools, motivation, and skills that they need to both develop as leaders and prepare for successful positions in the IDF. The ability to attain good positions in the IDF and succeed in their roles will prepares these young people for greater success in their future education and careers.
 - \$9,132 for a Culinary Arts and Healthy Cooking program. The Culinary Arts and Healthy Cooking Program will target children who attend Zinman's Youth Outreach Center – mainly Ethiopian-Israeli, and many from impoverished homes – and who often are not receiving adequate nutrition at home and are not developing healthy eating habits. The program will teach cooking skills alongside basic nutrition and provide healthy meals for youth in the after-school programs.
- \$90,000 in funds allocated to the JDC are available to reallocate to other programs within the JDC. These funds come from both PACT Afula and Incorporate Israel. JDC has decreased their request for Incorporate Israel from \$40,000 to \$30,000. The remaining \$80,000 comes from PACT Afula which – after Federation has invested \$3.6 million in the program for the past 16

years – is now being fully handed over to the Afula municipality by JDC for continued operation as a mark of its tremendous success. SP&A recommends that these \$90,000 be reallocated within JDC as follows:

- \$50,000 increase to the allocation for JDC's Camping in the Baltics program. The expansion of our support for Camping in the Baltics is in response to continued financial need for that program. Our Federation became one of the primary funders of the program and secured the camps when JDC lost a long-term funder – however, the continued financial need for the camp is significant and the program is both a high priority for the JDC and in line with Federation's priorities. **(Priority Area: Strengthening the Vibrancy of Jewish Life Overseas, outside Israel)**
- \$40,000 allocation to JDC's LGBTQ Capacity Building program. As an outgrowth of JDC's LGBTQ Mapping initiative, JDC will launch a capacity building program to strengthen the organizational capacity of Israel's LGBTQ nonprofits. CEOs and senior lay-leaders of the 15 largest LGBTQ organizations will participate in a seminar and mentoring program designed to upgrade capacity in internal management and governance, working with government, and financial resource development, including tapping the Israeli business sector using JDC's Synergy model. **(Priority Area: Strengthening Israeli Society Through Social Change - LGBTQ)**
- \$40,000 in new allocable dollars is allocated to Israel Hofsheet. Israel Hofsheet is a grassroots advocacy organization working to change the Israeli public perception of religion-state issues in Israel, and among many programs operates a social change and leadership development training course for local community activists. The Alumni Network project will target the graduates of this leadership course to provide them with ongoing support and guidance in their continued local civic activism. **(Priority Area: Strengthening Israeli Society Through Social Change – Religious Pluralism)**
- \$20,000 in new allocable dollars is allocated to the Jewish Agency for Israel for the AmiUnity program, directed to pluralism training for Federation's Congregational Shlichim. As a piece of the broader, multimillion dollar AmiUnity initiative, the Jewish Agency will work with the Federation to engage the 2018/2019 congregational shlichim to strengthen their understanding of pluralistic Judaism in North America. The shlichim will have weekly training seminars in DC with the senior shaliach. Upon return to Israel, the shlichim will commit to a minimum of one year of continued engagement and will be given micro-grants to develop programs to educate and engage Israelis about pluralistic Judaism. **(Priority Area: Strengthening Israeli Society Through Social Change – Religious Pluralism)**
- \$38,700 in new allocable dollars is allocated to Israel Gay Youth (IGY). IGY is a nation-wide organization that creates safe spaces for LGBTQ+ youth in Israel. IGY proposes establishing 4 new IGY groups in the social and geographic periphery; the extension of their urgent online response to 7 days a week; opening an additional youth club for Arab speakers in Israel's south; and support for IGY's Year of Service activities in the periphery. Each of these elements will target LGBTQ youth who are often at greater risk, because it can be much more challenging for youth in the social and geographic periphery to "come out" to family and friends. **(Priority Area: Strengthening Israeli Society Through Social Change - LGBTQ)**

- Increased support for Federation’s Congregational Shlichut program by directing up to \$380,000 of the overseas Core allocation to the Jewish Agency to cover JAFI’s costs for the shlichut program. Currently, \$250,000 of the Core allocation to JAFI is directed for this purpose, so the incremental increase is \$130,000. In addition, Federation has received directed gifts of \$56,400 for Congregational Shlichim that will also be allocated to JAFI to increase support for this program. Increased support for this program will enable Federation to expand this program next year by easing the financial burden on host congregations and achieve the original goal of 10 congregational Shlichim. This is a flagship program in partnership with JAFI and one that is replicable by many communities across North America. **(Priority Area: Expansion of Our Flagship Shlichim Initiative)**

FY19 National Allocations

Due to the disbanding of the National Federation / Agency Alliance in March, the Strategic Planning & Allocations committee has assigned a task force to look at the Federation’s allocations to national agencies over the summer. The task force’s recommendations on the distribution of the \$141,700 previously allocated to the National Alliance will be presented to the Executive Committee to review and finalize by the end of June.

Funding Priorities 2017

1. Engaging Families with Young Children

Research shows that parents' social networks play a large role in their determination to make Jewish choices. Parents want to connect with other parents going through the same experiences as well as build new friendships. Additionally, families are looking for high-quality experiences in which they can make meaningful connections with people in a similar life stage. Our Federation has strategically invested in this population to connect Jewish families with each other as early as possible, and to provide low barrier, easy access, high quality programs. We want to increase this investment to support further peer group development and influence later family decisions, such as enrollment in a Jewish preschool, Jewish camp, JCC and congregation.

2. Welcoming Interfaith Couples and Families

The Federation is committed to creating a Jewish community where we welcome everyone who wants to participate in Jewish life in the way that is most meaningful to them. We want to engage, educate and connect interfaith (and all) families to the richness of Jewish life which brings our community together. We are strategically investing in multiple areas that create a more welcoming Washington Jewish community. Existing investment areas, including interfaith initiatives, Honeymoon Israel, Jewish Food Experience, and collaborations with partner agencies, all create a more open and welcoming community so that all members can participate in the vibrancy of Jewish life.

3. Creating Meaningful Year-Round Adult Learning Opportunities

Jews, like all people, are searching for meaning, substance and connection. Judaism offers a system, a language, a heritage and tradition that responds to these needs. Jewish learning must be compelling and relevant; it must be adaptable and meaningful; it must motivate and empower people to own their personal Jewish journey; and it must enable us to collectively discuss and address critical issues that we face today as a community. The Federation aims to bring together national and international educational leaders (e.g., Hartman Institute, Hadar) with local agencies and congregations to create multiple options for year-round meaningful adult learning in a variety of formats.

4. Strengthening Jewish Identity among Teens and College Students

By the time two thirds of Jewish teens reach high school they are not involved in any Jewish experiences. We know from national studies that teens want Jewish role models who offer quality guidance and leadership opportunities. Both teens and college students need meaningful, relevant learning opportunities that advance or enhance their developmental and career needs. Programs need to be high quality and worth their time. We are fortunate to have numerous partners in our Jewish youth groups and Hillels that are engaging teens and college students in ways that make Judaism relevant and meaningful. They are developing leaders who are connecting to Judaism and Israel in a multitude of creative ways that match their interests and set a foundation for Jewish involvement. The Federation can amplify the impact of our partner youth groups and Hillels through increased funding for priority areas of engagement.

5. Expansion of our Flagship Shlichim Initiative

Our Federation is a national model for Israel engagement. A major factor in this success is the personal connections created by the 18 shlichim (Israeli emissaries) we host in our community. We are making an intentional effort to develop a large cohort of shlichim who work together, as well as in their own institutional placements. to directly connect with thousands of people of all ages each year. These are deep, ongoing relationships that profoundly shape the way our community relates to Israel. They are working in synagogues, JCCs, Hillels, summer camps, youth groups, and day schools. Our senior community shaliach provides mentoring, resources and training, and works with their institutional supervisors to ensure maximum impact. We have the

infrastructure and are positioned to amplify this program to its maximum potential by increasing the number of shlichim we bring to Greater Washington.

6. Inclusion of Individuals with Disabilities

In recent years, our Federation has been a driver of creating a Jewish community that is inclusive of people of all abilities. Through our active lay committee and professional staff dedicated to inclusion, we are creating culture change by working with agencies and congregations throughout the community to see disability inclusion as a defining characteristic of Jewish life rather than an act of kindness, as strengthening the collective rather than helping those less fortunate, and as a need to develop programs and spaces that are accessible to everyone rather than having “special programs” for individuals with disabilities. We need to increase our impact by expanding our work with our partner agencies and schools to provide the training, tools and resources so that our Jewish community is the leader in ensuring that people of all abilities can fully participate in Jewish life.

7. Jewish Overnight Camping

Immersive Jewish experiences such as overnight camping have proven to be one of the greatest influencers of long term Jewish involvement. The Federation has been supporting participation in Jewish camping for decades, through our direct support of our partner, Capital Camps, and through incentive grants to first-time Jewish overnight campers. With increased investment, we could dramatically change the landscape of participants in Jewish overnight camping, much in the way that Birthright Israel has created a sea change in the numbers of young adults traveling to Israel. If most children in Greater Washington were incentivized to have a Jewish overnight camping experience, the impact would be amplified throughout the entire community.

8. Strengthening Israeli Society Through Social Change

The Federation, through our Imagine Israel platform, has focused on engaging Washingtonians with Israel and Israelis through the lens of social change. We have identified four priority areas – religious pluralism, shared society among Jewish Israelis and Arab Israelis, the LGBTQ community, and inclusion of people with disabilities. We began this initiative by showcasing Israeli individuals and organizations that are creating change, through our Changemaker speaker series, podcasts, and partnerships with local and Israeli agencies to forge relationships. The next step is for our Federation make a philanthropic investment in strengthening Israeli society through social change. We will begin with strategic investments in the areas above so that Washington can be a partner for change as it continues to support Israel.

9. Strengthening the Vibrancy of Jewish Life Overseas (outside Israel)

Jewish communities throughout Europe, South America, and other countries around the world depend on our support, not only to meet their social welfare needs, but to help them develop their own vibrant Jewish life. Our overseas partners and other organizations are building Jewish identities and creating meaningful Jewish experiences, sometimes for people who are just learning that they are Jewish, through camping, JCCs, Hillels, Shabbat experiences, adult learning and much more. Last year, our Federation began support for JDC’s Jewish Camping Programs in the Baltics. We hope to expand our involvement with this program and explore additional areas of investment.

FY19 Allocation Recommendation to Local Partners & Programs

	A	B	C	D
Local Agency/Program	FY18 Allocations	FY19 Changes	FY19 Total Allocations	2017 Donor Designated Gifts
Bender JCC of Greater Washington	\$ 774,063		\$ 774,063	\$ 119,500
Campuses/Hillels <i>(see detail for campus allocations)</i>	\$ 232,027		\$ 232,027	\$ 2,500
Capital Camps and Retreat Center (CCRC)	\$ 120,078		\$ 120,078	\$ 10,000
Day Schools <i>(see detail for school allocations)</i>	\$ 1,351,951		\$ 1,351,951	
Edlavitch JCC of Washington DC (EDCJCC)	\$ 399,432		\$ 399,432	\$ 63,335
Jewish Coalition Against Domestic Abuse (JCADA)	\$ 49,719		\$ 49,719	
Jewish Community Center of Northern Virginia (JCCNV)	\$ 326,607		\$ 326,607	
Jewish Community Relations Council (JCRC)	\$ 603,013		\$ 603,013	\$ 14,794
Jewish Council for the Aging (JCA)	\$ 299,884		\$ 299,884	\$ 1,000
Jewish Foundation for Group Homes (JFGH)	\$ 189,104		\$ 189,104	\$ 7,000
Jewish Historical Society of Greater Washington	\$ 30,000		\$ 30,000	\$ 6,650
Jewish Social Service Agency (JSSA)	\$ 949,830		\$ 949,830	\$ 448,277
Moishe House	\$ 25,000		\$ 25,000	
Sulam		\$ 25,000	\$ 25,000	
Youth Group Grants (1)	\$ 58,236	\$ 25,000	\$ 83,236	
Community Projects				
Adult Education		\$ 25,000	\$ 25,000	
Campus Security	\$ 354,952		\$ 354,952	\$ 24,961
Coming of Age MD	\$ 7,672		\$ 7,672	\$ 272,648
Coming of Age VA	\$ 19,530		\$ 19,530	
Federation's Department of Jewish Life & Learning	\$ 546,040		\$ 546,040	\$ 285,740
Federation's Jconnect	\$ 236,773		\$ 236,773	\$ 599
Initiative in Congregational Education	\$ 55,957		\$ 55,957	
InterfaithFamily/DC	\$ 70,000	\$ (70,000)	\$ -	\$ 1,000
Interfaith Initiatives Grants Pool		\$ 100,000	\$ 100,000	
Israel Engagement	\$ 51,892		\$ 51,892	\$ 1,650
Israel Quest	\$ 20,868		\$ 20,868	
Federation's Jewish Food Experience	\$ 30,000		\$ 30,000	\$ 32,254
JFamily Ambassadors (2)		\$ 75,000	\$ 75,000	
Repayment of JLL Loan (3)	\$ 75,000	\$ (75,000)	\$ -	
One Happy Camper (4)	\$ 47,186	\$ 50,000	\$ 97,186	\$ 15,000
PJ Library	\$ 25,000	\$ 72,000	\$ 97,000	\$ 195,160
Donor Designated Gifts				
Addiction Prevention and Recovery Program				\$ 15,000
Events and Sponsorships				\$ 624,376
Good Deeds Day				\$ 22,002
Grand Slam Sunday				\$ 12,000
Jewish Millennial Engagement Project				\$ 37,175
Jewish Women's Renaissance Project				\$ 20,000
Sunflower Bakery & Café				\$ 10,000
Teen Israel Engagement Fellowship				\$ 25,473
Tikkun Olam Women's Foundation				\$ 179,380
Young Adult & Birthright Follow Up				\$ 165,607
Other Designated Gifts				\$ 2,698
TOTAL LOCAL ALLOCATIONS	\$ 6,949,815	\$ 227,000	\$ 7,176,815	\$ 2,615,779

Notes: (1) \$25,000 increase to Youth Groups designated to BBYO expansion in NoVA
 (2) Jfamily Ambassadors for expansion in DC and Montgomery County
 (3) PJLL loan has been fully repaid
 (4) \$50,000 increase to One Happy Camper designated for families in NoVA

FY19 Allocation Recommendation: Hillels

		A	B	C
Campus	%	FY18 Allocations	FY19 Allocations	2017 Donor Designated Gifts
U of MD	25%	\$ 58,007	\$ 58,006.82	
GWU	24%	\$ 55,687	\$ 55,687	
UVA	11%	\$ 25,523	\$ 25,523	\$ 2,500
AU	11%	\$ 25,523	\$ 25,523	
Va Tech	11%	\$ 25,523	\$ 25,523	
GMU	11%	\$ 25,523	\$ 25,523	
Gallaudet	2%	\$ 4,641	\$ 4,641	
Georgetown	2%	\$ 4,641	\$ 4,641	
James Madison	1%	\$ 2,320	\$ 2,320	
Mary Washington	1%	\$ 2,320	\$ 2,320	
William & Mary	1%	\$ 2,320	\$ 2,320	
	100%	\$ 232,027	\$ 232,027	\$ 2,500

FY19 Allocation Recommendation: Day Schools

	A	B	C	D	E	F	G	H
School	FY18 Allocations				FY19 Allocations			
	FY17 Enrollment	Alloc. Based on Per Capita w/o Security	Security Allocation	Total w/ Security - FY18 Recom.	FY18 Enrollment	Alloc. Based on Per Capita w/o Security	Security Allocation	Total w/ Security - FY19 Recom.
Charles E. Smith Jewish Day School	943	\$ 442,190	\$ 22,500	\$ 464,690	925	\$ 444,224	\$ 22,500	\$ 466,724
Gesher Jewish Day School	144	\$ 67,524	\$ 21,500	\$ 89,024	115	\$ 55,228	\$ 21,500	\$ 76,728
Milto Gottesman Jewish Day School	343	\$ 160,839	\$ 21,500	\$ 182,339	322	\$ 154,638	\$ 21,500	\$ 176,138
Berman Hebrew Academy (1)	674	\$ 316,051	\$ 21,500	\$ 337,551	618	\$ 296,789	\$ 21,500	\$ 318,289
Torah School of Greater Washington (2)	366	\$ 171,624	\$ 12,000	\$ 183,624	376	\$ 180,571	\$ 12,000	\$ 192,571
Yeshiva of Greater Washington	202	\$ 94,722	\$ -	\$ 94,722	253	\$ 121,501	\$ -	\$ 121,501
Total	2,672	\$ 1,252,951	\$ 99,000	\$ 1,351,951	2,609	\$ 1,252,951	\$ 99,000	\$ 1,351,951

Per Capita	
FY18	FY19
\$ 468.92	\$ 480.24

Notes: (1) FY18 Berman enrollment included Sulam enrollment (31 students). FY19 Berman enrollment does not include Sulam enrollment.

(2) Total security allocation to Torah School is \$21,500, comprised of \$12,000 from allocable dollars and one-time grant of \$9,500 from prior year unspent funds.

FY19 Allocation Recommendation: Youth Groups

	A	B
Regional Youth Group	F18 Allocations	FY19 Allocations
BBYO	\$ 23,294	\$ 23,294
<i>BBYO Expansion in NoVA</i>		\$ 25,000
USY	\$ 7,571	\$ 7,571
NFTY	\$ 7,571	\$ 7,571
NCSY	\$ 5,824	\$ 5,824
Tzofim	\$ 5,824	\$ 5,824
Habonim	\$ 4,659	\$ 4,659
B'nai Akiva	\$ 3,494	\$ 3,494
	\$ 58,236	\$ 83,236

FY19 Allocation Recommendation to Israel & Overseas Partners & Programs

	A	B	C	D
Overseas Partners and Programs	FY18 Allocations	FY19 Changes	FY19 Total Allocations	2017 Donor Designated Gifts
American Jewish Joint Distribution Committee (JDC) (1)	\$ 375,724	\$ -	\$ 375,724	\$ 37,900
PACT Afula	\$ 80,000	\$ (80,000)	\$ -	
Welfare Relief, Moscow	\$ 25,000		\$ 25,000	
Incorporate Israel	\$ 40,000	\$ (10,000)	\$ 30,000	
Camping in the Baltics	\$ 63,500	\$ 50,000	\$ 113,500	
LGBTQ Capacity Building Program		\$ 40,000	\$ 40,000	
JDC Unrestricted Allocation (balance)	\$ 167,224		\$ 167,224	\$ 26,900
LGBT Mapping Initiative				\$ 11,000
Imagine Israel	\$ 212,820		\$ 212,820	
Israel Gay Youth		\$ 38,700	\$ 38,700	
Israel Hofsheet		\$ 40,000	\$ 40,000	
Israel Religious Expressions Platform (iRep)	\$ 25,000		\$ 25,000	
Jewish Agency for Israel (JAFI)	\$ 252,098	\$ 20,000	\$ 272,098	\$ 1,115,350
Federation Community Shaliach	\$ 131,000		\$ 131,000	
AmiUnity - Pluralism Training		\$ 20,000	\$ 20,000	
Youth Futures Afula	\$ 111,180		\$ 111,180	
Jewish Agency Unrestricted (balance)	\$ 9,918		\$ 9,918	\$ 54,100
Alma Derech Eretz				\$ 6,250
Atidim				\$ 1,000,000
MASA				\$ 37,500
Ofek Mechinot				\$ 10,000
St. Petersburg Summer Camp				\$ 7,500
Network of Community Centers in Beit Shemesh / Zinman Matnas (2)	\$ 135,132	\$ -	\$ 135,132	\$ 12,000
Empowerment Program	\$ 19,132	\$ (19,132)	\$ -	
Culinary & Healthy Food Program		\$ 9,132	\$ 9,132	
Teen Leadership & IDF Training Program		\$ 10,000	\$ 10,000	
Inya Linya/ Scholastic Assistance Program	\$ 46,000		\$ 46,000	
Youth Outreach Centers	\$ 70,000		\$ 70,000	\$ 12,000
Social Venture Fund for Jewish-Arab Equality and Shared Society	\$ 50,000		\$ 50,000	\$ 25,000
World ORT	\$ 19,568		\$ 19,568	
JFNA Overseas Core Allocation (Balance)	\$ 2,971,758	\$ 56,400	\$ 3,028,158	\$ -
Unrestricted Core	\$ 2,721,758	\$ (130,000)	\$ 2,591,758	
Directed to Congregational Shlichim program, JAFI (3)	\$ 250,000	\$ 186,400	\$ 436,400	
Other Donor Designated Gifts				\$ 105,085
American Friends of Herzog Hospital				\$ 43,000
Bialik Rogozin School				\$ 5,000
Garin Ometz Akko				\$ 12,085
Israel Venture Network				\$ 40,000
Ruach Hadasha				\$ 5,000
	\$ 4,042,100	\$ 155,100	\$ 4,197,200	\$ 1,295,335

Note: (1) JDC funds to be redirected within JDC: \$80,000 from PACT and \$10,000 from Incorporate Israel.

(2) Zinman funds to be redirected within Zinman: \$19,132 from Empowerment program.

(3) The funds allocated for the Congregational Shlichim program are an "up to" amount based on 10 congregational shlichim.

FY19 Allocation Recommendation to National Partners & Programs

	A	C	D
National Partners and Programs	FY 18 Allocations	FY 19 Allocations	2017 Donor Designated Gifts
Jewish Federations of North America (JFNA)	\$ 1,036,000	\$ 1,036,000	\$ 562,517
Fair Share/JFNA dues estimated	\$ 756,000	\$ 756,000	\$ 23,000
Israel Office	\$ 73,000	\$ 73,000	\$ 32,580
Birthright Israel Fair Share	\$ 207,000	\$ 207,000	\$ 41,300
National Alliance (1)	\$ 141,700	\$ 141,700	
Dues	\$ 10,800	tbd	
Allocation to Partners listed below	\$ 130,900	tbd	
Additional Initiatives of Interest to Washington	\$ 34,500	\$ 34,500	
Inter Agency Task Force on Israeli Arab Issues (JDC)	\$ 5,000	\$ 5,000	
Israel Action Network	\$ 27,000	\$ 27,000	
JPRO Network	\$ 2,500	\$ 2,500	
Total Allocation	\$ 1,212,200	\$ 1,212,200	\$ 562,517

Note: (1) The National Alliance is dissolving at the end of FY18. SP&A has established a task force to determine recommendations for the reallocation of the \$141,700 among national agencies. These recommendations will be completed by early-mid summer.

National Alliance Partner Organizations
70 Faces Media (JTA)
American Jewish World Service
BBYO
The Hebrew Immigrant Aid Society
Hillel: The Foundation for Jewish Campus Life
The Jewish Community Centers Association of North America
The Jewish Council for Public Affairs
JFNA Education and Engagement Unit
NCSEJ: National Coalition Supporting Eurasian Jewry
Network of Jewish Human Service Agencies

APPENDIX: Our Partners at a Glance

Local Partners & Programs

Bender JCC of Greater Washington provides a welcoming and inclusive environment that connects Jewish community members with each other, Israel and the broader community. The Bender JCC serves individuals of all ages, abilities and backgrounds through programs that enhance their social, physical, intellectual and spiritual well-being. With the foundation of a fitness center, preschool, inclusive day camp, and arts and culture programs, the Bender JCC touches every part of the lives of the families in our community both within their facility and throughout Montgomery County—newborns, children, teens, adults, active seniors and individuals with special needs.

Campus Hillels are one of the main vehicles through which students connect to Jewish life on campus. College years are traditionally years for exploration and identity building; the choices students make during those four years influence the choices they make later on about their life and lifestyle. There are myriad educational and experiential opportunities for the more than 16,500 students on the 11 local college campuses that receive support and resources through The Federation. Each campus offers unique programming suited to its student population's needs and wants.

American University	Georgetown University	University of Maryland
Gallaudet University	James Madison University	University of Virginia
George Mason University	The College of William & Mary	Virginia Tech
George Washington University	University of Mary Washington	

Capital Camps & Retreat Center (CCRC) provides enriching Jewish overnight camp experiences to approximately 1,000 children each summer. CCRC also provides retreat facilities and programmatic services to approximately 100 local and national organizations, community agencies, and congregations on an annual basis. At Capital Camps, campers and staff are encouraged to challenge assumptions, learn and grow, and explore and celebrate their Jewish identity, in a safe, fun and nurturing environment. In addition, year-round programming at the retreat center, including the agency's family camp programs, provides a unique setting for groups of any size to relax, learn and play together.

Day Schools are valued by the Federation as a key factor in ensuring a vibrant future for the Jewish people. Day schools produce informed Jewish citizens who are able to integrate Jewish values and practices into all aspects of their lives. The six Jewish day schools that receive a Federation allocation provide excellent educations and give children a substantive Jewish identity built on a strong foundation of Jewish learning. Annual Campaign allocations to day schools are based on their enrollment in Kindergarten and up. Day schools also receive an additional allocation to subsidize the cost of a security guard.

School	Grades	Number of Students K+ in FY18
Charles E. Smith Jewish Day School (MD)	K–12	925
Gesher Jewish Day School (VA)	K–8	115
Milton Gottesman Jewish Day School (DC)	K–6	322
Berman Hebrew Academy (MD)	K–12	618
Torah School of Greater Washington (MD)	K–6	376
Yeshiva of Greater Washington (MD)	7–12	253

Edlavitch JCC of Washington DC (EDCJCC) provides programs to preserve and strengthen Jewish identity, heritage, tradition and values through a wide variety of social, cultural, recreational and educational programs and services. The Edlavitch JCC of Washington DC accomplishes these goals in ways which reflect its unique location and role. The Edlavitch JCC collaborates with more than 150 organizations each year—from cultural institutions across all artistic disciplines to local and national LGBT groups, synagogues, and 80 social services agencies in the metropolitan area—throughout all of the Edlavitch JCC's diverse program areas.

Jewish Coalition Against Domestic Abuse (JCADA) delivers comprehensive services to victims of domestic and dating abuse in the Greater Washington area. JCADA addresses the unique needs of Jewish victims and their families. Through educational programming, JCADA empowers future generations to develop healthy relationships and trains community leaders on appropriate responses to domestic abuse. As a coalition, JCADA collaborates with Jewish and non-Jewish community partners to create a new cycle of healthy and safe living for our community.

Jewish Community Center of Northern Virginia (JCCNV) is dedicated to building a strong and vibrant Jewish community by providing meaningful opportunities to engage in Jewish life. Their programs span all five counties in Northern Virginia and touch more than 10,000 individuals each year through cultural arts programs and community-wide celebrations. They run a region-wide *Shlichut* (Israel emissary) program that services all Jewish organizations in Northern Virginia, hosting Israel events and providing educational opportunities. They enable families with young children to connect to Jewish life through engagement and outreach programs such as JFamily Ambassadors, as well as through preschool, childcare, summer camp and after-school enrichment. They also provide numerous activities for individuals 55+ and health and wellness education for all ages. The JCCNV offers programming for the military veteran's community and manages an award-winning special needs program.

Jewish Community Relations Council (JCRC) focuses its work on four areas—government relations, Israel advocacy, social justice and intergroup relations. JCRC advocates for Jewish institutions and values, educates the community about key issues of concern, and reaches out to build relationships among interfaith leaders. JCRC works on behalf of 210 constituent agencies, organizations and synagogues in Greater Washington. JCRC advocates on behalf of our partner agencies to increase access to county, state and federal funding for much-needed social services.

The Jewish Council for the Aging of Greater Washington (JCA) serves more than 30,000 older adults and family caregivers. Its programs enable local seniors to live independently, find care and compassion, get information and resources, learn and grow, embrace technology, find a job, build bridges with children, and shatter stereotypes. JCA is a partner (and transportation provider) for the Coming of Age programs in Virginia and Maryland, along with the JCCNV, JCCGW and JSSA.

Jewish Foundation for Group Homes (JFGH) enhances the independence and quality of life for adults with disabilities, offering long-term support, personal assistance services and training to promote independent living skills for its residents and clients. JFGH supports adults in 23 group homes (20 in Maryland and 3 in Northern Virginia), 3 alternative living units, and 39 apartments through its Mary and Charles Oshinsky Apartment program, and it supports over 15 apartments through their Henry and Alice Greenwald Community Supported Living Arrangement Program. Additionally, JFGH operates an innovative program for young adults, The Sally and Robert Goldberg MOST program (Meaningful Opportunities for Successful Transitions) and collaborates with the JCCGW for the Tikvah and Hevra social and recreational programs. JFGH serves approximately 200 individuals.

Jewish Historical Society of Greater Washington (JHSGW) explores the unique Jewish heritage of Washington as a hometown and as the nation's capital. JHSGW is the region's foremost destination and source for American Jewish history. JHSGW engages and inspires adults and children through exhibitions, public programs and educational initiatives. The organization collects, preserves, and shares material that documents the story of the Jewish community in the Washington DC region as a lens through which broader national and international history may be explored.

Jewish Social Service Agency (JSSA) has been our Jewish community's largest safety net provider for more than 120 years. JSSA annually helps more than 30,000 individuals and families of all faiths throughout the metro DC area address their emotional, social and physical challenges, regardless of the ability to pay. JSSA offers a comprehensive range of services and programs for children, adults, individuals with special needs, seniors and families including mental health counseling, care management, specialized employment, in-home support for seniors, support for Holocaust survivors, hospice care, professional trainings, Jewish chaplaincy and Jewish community outreach and volunteer services. JSSA also collaborates with many community and county organizations, public and private schools, and synagogues.

Moishe House is a pluralistic international organization that provides meaningful Jewish experiences to young adults in their 20s. Moishe House's innovative model trains, supports and sponsors young Jewish leaders as they create vibrant home-based communities for themselves and their peers. While Moishe House is a national organization, the Federation's allocation specifically supports the four Greater Washington-area houses and local programming, all of which reach nearly 2,000 22-30 year-olds in our community. The Washington-area Moishe Houses hosted 289 unique religious, social, educational, and volunteer programs this past year; 78 were in partnership with another organization. The Moishe House model creates a pipeline for Jewish leadership; participants often increase their involvement in Jewish life outside of Moishe House, find increased comfort in identifying as Jewish, develop a willingness to organize, motivate, and invite other young adults to be involved in Jewish life, and build a stronger sense of their own personal Jewish identity.

Sulam's team of special educators provides K-12 students, in Jewish Day Schools with which it partners, with a highly individualized educational program - in a unique combination of inclusion in general education classrooms and targeted instruction - to help ensure maximum learning potential for a lifetime.

Youth Groups: Funds are distributed to seven local youth groups: B'nei Akiva, BBYO, Habonim Dror, NCSY, NFTY-MAR, Tzofim, and USY. These local youth groups foster a commitment to Jewish values and ideals and nurture awareness of issues in the Jewish community. By providing opportunities for their members to celebrate Jewish culture, heritage and traditions, and by helping them develop leadership skills, youth groups encourage tweens and teens to become a vital part of the Jewish life in our community.

Community Projects

Campus Security supports ongoing security costs at 15 partner agencies and the Charles E. Smith Community Campus. Since 2001, security continues to be a shared funding partnership between the Federation and our agencies and schools.

Coming of Age in Maryland is a program for active seniors coordinated by JSSA in partnership with JCCGW and JCA. The program serves 1,300 older adults. Activities and services include wellness, cultural and recreational activities; excursions to the JCCGW and venues throughout greater Washington (with transportation provided by JCA); home health services; social work support; and referrals to community resources.

Coming of Age in Northern Virginia serves seniors in Northern Virginia. The consortium of providers includes JCCNV, JCA and JSSA. The Coming of Age program connects isolated and unaffiliated seniors with a full array of Jewish cultural, social, educational and recreational activities at six synagogues and the JCCNV. Services include: wheelchair-accessible transportation; synagogue and JCCNV-based lunch programs; workshops and groups led by facilitators; lectures and excursions; case management and geriatric counseling services; and rapid-response emergency financial assistance.

Federation's Department of Jewish Life and Learning inspires educators with high quality professional development; advocates for and helps create inclusive environments for individuals with disabilities, family members from other faith traditions, and individuals with diverse gender and sexual identities; provides thought leadership that inspires new approaches to Jewish learning; convenes the community's education professionals in order to identify shared goals, pool resources, share expertise and skills, and foster creative collaboration; and promotes the experience of Jewish living and learning through multiple expressions including philanthropy, social action, Israel engagement, family activities and community involvement.

Federation's Jconnect, a community service program of The Jewish Federation of Greater Washington, is a low-barrier, customer-friendly gateway for connection to and engagement with the Jewish community. Jconnect was developed so that everyone throughout Greater Washington can connect with Jewish life in whatever way they choose – through volunteering, education, networking and more. Doing Good with Federation and Good Deeds Day are just two of the Federation's Jconnect social action initiatives that reach over 9,000 people throughout the year.

Federation's Jewish Food Experience brings thousands of people together through the universal language of Jewish food, which is so much a part of Jewish culture, tradition and religion. The JFE website is designed as a gateway to participation opportunities across the Greater Washington area and was developed by the United Jewish Endowment Fund. JFE partners with 60 agencies, congregations and organizations to co-sponsor more than 210 events, reaching in excess of 12,140 people. JFE is a proven successful model of outreach to unaffiliated Jews in the Greater Washington community who are not otherwise reached by Jewish institutions. It recently franchised opportunities to five other Federation communities in the US.

Initiative in Congregational Education Grants (ICE) provide grassroots support to congregational schools. The grants are a proven catalyst in transforming education programs while at the same time promoting broad-based networking and learning. The ICE program strengthens the dynamic of the Federation/synagogue relationship. Federation support of innovative programs has empowered congregations and their leadership to address some of the systemic challenges within their educational programs.

Interfaith Initiatives Grants Pool, operated by the Interfaith Committee in Federation's Engagement department, will promote interfaith engagement initiatives across the community. The funding pool will provide grants to organizations – Federation's partners, synagogues, and other organizations -- to support initiatives welcoming interfaith couples and families to the Jewish community.

Israel Engagement Program establishes new and dynamic approaches to Israel engagement in our local community in partnership with the Jewish Agency for Israel. Led by an outstanding community Shaliach, the Israel engagement program is a carefully constructed matrix of programs that target our community's diverse cohort groups—from early childhood through the college years, from young professionals to empty-nester adults.

Israel Quest is a Jewish teen identity project of the United Jewish Endowment Fund, The Jewish Federation of Greater Washington and local congregations and regional youth organizations. Established in 1994, Israel Quest is based on the guiding principle that continuing Jewish education, linked with a formative Israel experience, will forge a strong Jewish identity in the hearts and minds of our youth. In order to achieve this goal, Israel Quest provides subsidies to 9–12th graders for participation in teen travel programs to Israel.

JFamily Ambassadors, building on the rapid growth of PJ Library to the entire community, is a way to provide deeper, meaningful connections and engagement opportunities for the 6,300 families enrolled. The JFamily Ambassador program serves to complement PJ Library. Neighborhood-based JFamily ambassadors serve to connect new parents to each other and to the community through one-on-one meetings with parents of children 0-3. The ambassadors' goal is to welcome parents to the Jewish community and connect them to others; be the concierge and connector to Jewish life for these families by facilitating playgroups and get-togethers and introducing the parents they meet with to other opportunities in the Jewish community; and to facilitate mini-communities that will be the foundation to form strong, lasting relationships and Jewish connections.

One Happy Camper provides subsidies as incentives to encourage Washington families to send their children to Jewish overnight camp for the first time. Immersive Jewish experiences are a key factor in establishing a strong Jewish identity.

PJ Library (PJ, as in "pajamas") provides families raising Jewish children from 6 months–8 years old with a free treasury of expertly-selected Jewish books and music each month, complemented by hundreds of family-friendly events with 43 local partners. PJ Library reaches 5,700 families through its efforts and hosts or co-sponsors over 300 events each year. In addition, PJ Our Way, a new initiative that sends chapter books to 8½-11 year olds, reaches an additional 1,000 families.

Donor Designated Gifts to Local Partners and Projects

Addiction Prevention and Recovery Program brings greater access to addiction prevention resources to members of the Greater Washington community through a Jconnect resource page, community trainings and workshops, and updates to Federation's holiday guide books to include new inclusive language that is sensitive to people with addiction issues.

Adult Education is an initiative of the Jewish Federation to bring together national and international educational leaders, such as the Hartman Institute and Hadar, with local agencies and congregations to create multiple options for year-round meaningful adult learning in a variety of formats.

Good Deeds Day is an annual community day of service and global celebration of doing good. The day offers the entire community a variety of hands-on volunteer projects where they can roll up their sleeves and make an impact. Over 8,000 volunteers take part in this initiative in the Greater Washington area.

Grand Slam Sunday is an annual community gathering at Nationals stadium. Through baseball, this annual, end-of-summer celebration that gathers over 1,500 community members, connects Jews to one another and to the larger Jewish community. The feedback Federation has received from attendees confirms our city's love of baseball, the Nationals and the Jewish community.

Jewish Millennial Engagement Project gives young adults in the Washington area a way to experience Judaism without the formalities of a synagogue.

Jewish Women's Renaissance Project seeks to inspire women to transform themselves, their families, and their communities. JWRP's 8-day journey through Israel is more than a tour; it is an opportunity for the participants to engage in a spiritual journey. Thousands of women from 21 different countries have already experienced this life-changing trip, including hundreds from the Greater Washington community who return home with a deep connection to Israel and a desire to connect with their local community.

Sunflower Café and Bakery is the only inclusive training program in Maryland that prepares young adults with learning differences for employment success in pastry arts, baking or related industries. A community-based social enterprise focused on expanding job training and employment opportunities, workforce skills learned at Sunflower Bakery and Café Sunflower are marketable and transferable. The students work in the main bakery in upper Montgomery County, and also learn customer service skills at the Sunflower Café located in the Federation lobby.

Teen Israel Engagement Fellowship is a unique program for teens to develop and discuss their connection to Israel in a safe space and an authentic way. Teens explore Israel as a Jewish and democratic state; examine the conflict, differing narratives, and ways to combat BDS; gain advocacy skills and become savvy consumers of information; and evaluate the many ways they can continue to engage with Israel on campus and beyond.

Young Adult and Birthright Follow-Up is a key element of Federation's engagement strategy. Federation supports both Birthright Israel college trips and community trips for post-college young adults, and focuses on post-trip follow-up as key to engaging these young adults in the Jewish community when they return home. Federation operates NEXT DC, the DC-area Birthright Israel alumni network, which includes programs like the Alumni Leadership Mission to Israel, Reverse Mifgash, and much more to enable Birthright alumni to continue their connection with Israel and the Jewish community.

Israel & Overseas Partners & Programs

JFNA Overseas Core allocations are determined by the leadership of the Jewish Federations of North America based on available resources to support the core missions of our overseas partners. The core allocation gives our partners the flexibility to support their primary mission and respond quickly to emergencies. Core funds are distributed to the Jewish Agency for Israel, the American Jewish Joint Distribution Committee and World ORT. The missions of these partners are described below.

American Jewish Joint Distribution Committee (JDC) acts as the response system and overseas arm of the American Jewish community to ensure the spiritual and physical well-being, security and dignity of the Jewish People worldwide. Our allocation to JDC helps rescue Jews in danger; provides food and medical relief to the elderly and impoverished; helps communities rebuild Jewish life; and works with the government of Israel to respond to the most pressing social needs in Israel. JDC is helping Jewish communities in 63 countries. In addition to their unrestricted grant, the JDC receives the following program grants:

Camping in the Baltics, newly supported by Federation as an initiative to strengthen the vibrancy of Jewish life overseas outside of Israel, features Jewish sleep-away camps in Latvia, Lithuania and Estonia which bring together hundreds of Jewish children and parents from across the region to learn about Jewish culture and traditions, and gain a sense of Jewish identity and pride. Open to children, teens and multigenerational families from all three countries, camps usually last a week and take place during school vacations throughout the year.

Incorporate Israel, a JDC program, is guiding Israel's business sector to take leadership on improving the employment of Israelis with disabilities. The program guides senior executives and HR departments in some of Israel's largest companies about how to successfully hire and integrate Israelis with various types of disabilities into their companies.

Welfare Relief, Moscow provides sustenance and support to the elderly living in dire poverty with a range of humanitarian services including homecare, food, medical care and emergency relief.

LGBTQ Capacity Building program emerged as an outgrowth of JDC's LGBTQ Mapping initiative. JDC is launching a capacity building program to strengthen the organizational capacity of Israel's LGBTQ nonprofits. CEOs and senior lay-leaders of the 15 largest LGBTQ organizations will participate in a seminar and mentoring program designed to upgrade capacity in internal management and governance, working with government, and financial resource development, including tapping the Israeli business sector using JDC's Synergy model.

Imagine Israel is the Federation's initiative to engage Washingtonians with Israel and Israelis through the lens of social change. Through Imagine Israel and its wide variety of programming – podcasts, the Changemakers series, and other programs – the Federation envisions a Washington community where individuals can create meaningful peer-to-peer relationships with Israelis, learn about social issues locally and in Israel, and have opportunities to make real, sustained impact in a variety of social issues in Israel.

Israel Gay Youth (IGY) is a national organization that creates safe spaces for LGBTQ+ youth in Israel. Through a grant from the Federation, IGY will establish 4 new groups in the social and geographic periphery; extend their urgent online response to 7 days a week; open an additional youth club for Arabic speakers in Israel's south; and support IGY's Year of Service activities in the periphery. Each of these elements will target LGBTQ youth who are often at greater risk, because it can be much more challenging for youth in the social and geographic periphery to "come out" to family and friends.

Israel Hofsheet is a grassroots advocacy organization working to change the Israeli public perception of religion-state issues in Israel, and among many programs operates a social change and leadership development training course for local community activists. The Alumni Network project targets the graduates of this leadership course to provide them with ongoing support and guidance in their continued local civic activism.

Israel Religious Expressions Platform (iRep), aims to strengthen Israeli civil society and encourage respect for diverse Jewish expressions through tackling challenges religion-state issues in Israel. Through grant-making and other efforts supporting a broad network of grassroots democracy and civil society organizations, iRep is currently focused on advance a civil marriage option within Israel.

Jewish Agency for Israel, our Federation's partner in strengthening the future of Israel and the Jewish world, is active throughout Israel and in more than 60 countries around the world. Our core allocation to the Jewish Agency provides services to new immigrants at their time of greatest need; supports vulnerable Israelis living on the geographic or social periphery; and cultivates Jewish and Zionist identity-forming experiences in Israel and around the world. In addition to their core grant, the Jewish Agency for Israel receives the following program grants:

AmiUnity Initiative will engage the Jewish Federation of Greater Washington's 2018/2019 Congregational Shlichim to strengthen their understanding of pluralistic Judaism in North America. The shlichim will have weekly training seminars in DC with the senior shaliach. Upon return to Israel, the shlichim will be given micro-grants to develop programs to educate and engage Israelis about pluralistic Judaism.

Congregational Shlichut Program: The Jewish Federation is partnered with 8 congregations and 3 schools in the Greater Washington region, bringing nine young shlichim (Israeli emissaries) to the Greater Washington community. The shlichim work together to enhance Israel programs both at their "home" synagogues as well as for the larger community. The expanded shlichim model creates an even more dynamic platform for Israel outreach and engagement in our local community, impacting thousands of people throughout the Greater Washington area. The funds to support the Congregational Shlichut Program are being directed to the Jewish Agency for Israel through the JFNA Overseas Core.

Shlichut: These funds support the Shaliach (Israeli emissary), who promotes personal relationships with Israel and helps local institutions (e.g. congregations, schools, JCCs, Hillels) engage their constituents with Israel in a more systemic and experiential manner. (Additional information on our Israel Engagement Program is found in the "Local Partners: Community Projects" section of this report.)

Youth Futures Afula provides a range of services for children (in grades 4–6) from underprivileged families, considered to be at-risk or not currently reaching their potential, thereby perpetuating the cycle of poverty. Mentors work closely with small groups of children and their families, providing a range of opportunities to help children create new futures for themselves. The holistic program includes academic support, extracurricular activities, family support and coordination of city-wide services from many departments.

Network of Community Centers in Beit Shemesh / Zinman Matnas: The Jewish Federation of Greater Washington has supported the Ethiopian-Israeli community in Beit Shemesh for the past 10 years and is committed to continuing its support of that community's successful absorption into Israeli society. This is achieved through a partnership with the Zinman Matnas, a local community center in Beit Shemesh's Gefen neighborhood, which has a high concentration of at-risk Ethiopian-Israeli youth.

Teen Leadership and IDF Training Program prepares teens for entry into the IDF (Israel Defense Forces). In Israel, the position that soldiers achieve in the army can position them for continued success later in life, and teens from at-risk communities often struggle to obtain elite positions in the army. The Teen Leadership and IDF Training Program provides teens at Zinman with the tools, knowledge, and motivation for successful entry into the IDF, as well as with leadership skills and self-confidence to carry them through into their adult years.

Culinary and Nutrition Program not only provides substantive and healthy after school snacks and meals for children who may otherwise not be receiving needed nutrition at home, but also educates them about healthy eating and teaches them basic food preparation skills. For many of these children, this may be the only healthy food they will have during the day.

Inya Linya/Scholastic Assistance Program provides afterschool academic assistance, extra-curricular activities and a hot meal to Ethiopian-Israeli children from disadvantaged families in grades 3–6. This program is managed and operated by staff at the Zinman Matnas in partnership with the administrative and teaching staff at local schools.

Youth Outreach Centers at the Zinman Matnas provide a safe physical haven for youth-at-risk. The Centers provide a critical alternative to keep youth safe with enriching afterschool and leadership activities, such as dance and self-defense classes, sports activities, leadership groups, discussion groups, holiday celebrations, and field trips.

Social Venture Fund for Jewish-Arab Equality and Shared Society is a coalition of Federations, foundations, and individuals who pool funds for joint grant-making to shared society projects in Israel – primarily focused on economic development and improving educational development of the Israeli Arab population. For the past decade, this effort has attracted over \$7 million of collective investment from 35 different funders to address the unmet needs of Israel's 1.6 million Arab citizens, helping them integrate more fully into Israeli society and strengthening Jewish-Arab relations.

World ORT is the largest Jewish education and training organization in the world. Today, World ORT has projects in 50 countries. In Israel, World ORT operates a variety of technical and science programs for high school and college students.

Donor Designated Gifts in Israel

Note: Each program implemented by a Federation partner is noted in parentheses.

Alma Derech Eretz (Jewish Agency for Israel) is an army-preparatory program aimed at empowering young women from all over Israel. The program provides them with opportunities to study history, Judaism, gender studies and physical education, and exposes them to other strong women achieving success in the Israeli Defense Forces.

Atidim (Jewish Agency for Israel) is a “gifted and talented program” for Ethiopian-Israeli high school students and others from disadvantaged families.

LGBT Mapping Initiative (JDC) was an extensive mapping of the LGBTQ nonprofits, inter-organizational network and ecosystem, with the goal to lend way to comprehending existing services and accomplishments, as well as current challenges, needs, and opportunities that LGBTQ nonprofits face.

MASA Israel Journey (Jewish Agency for Israel) connects Jewish young adults ages 18 to 30 to gap year, study abroad, internships, and volunteer programs. No other organization makes it easier for young adults to have exciting, life-changing experiences in Israel. Over 10,000 young adults participate in Masa programs each year from all over the world. Over 60% of those participants are from North America.

Ofek Mechinot (Jewish Agency for Israel) is a model that seeks to make pre-military academies accessible to youth from socially and economically marginalized backgrounds. Each Ofek Mechina cohort consists of roughly 40 Israeli high school graduates who gain access to tools, sharpen skills, and broaden their networks in order to succeed in the military and beyond as contributing citizens of Israel.

St. Petersburg Summer Camp (Jewish Agency for Israel) received support from the Lion of Judah Women's Mission to St. Petersburg participants, enabling a group of young Russian Jewish teens to attend a ten-day session of Jewish camp. Campers learn about Jewish traditions and Israel, and socialize with Jewish peers in a supportive, fun atmosphere.

Non-Partner Designated Gifts were distributed to American Friends of Herzog Hospital, Bialik Rogozin School, Garin Ometz Akko, Israel Venture Network, and Ruach Hadasha.

The Jewish Federation of Greater Washington
Budget Recommendation from Executive Committee to Board
FY2018/2019

Executive Summary

For the coming year, the budget that the Finance Committee and Executive Committee is recommending is one that will set the organization up to take advantage of our strategic plan. The theme that should become clear as you read the recommendations below is an investment in the future. We are proposing incremental investments in FRD as well as in our team overall. We will continue to recalibrate our operations and look critically at what we do and how we do it to strengthen the core organization for future growth. However, since we have embarked on a strategic planning process that will conclude in Fall 2018, the budget recommended focuses on the following goals which are also included in the CEO metrics approved by the Executive Committee through December 2019:

- Invest in capacity for strategic plan implementation
- Begin to increase investment in Northern Virginia (NOVA)
- Expand FRD investments in key areas
 - Targeted campaign event
 - Targeted overseas missions
 - Donor acquisition/retention
 - DAF servicing
 - Philanthropic advisory services
- Increase program evaluation and measurement
- Expand staff development and increase retention
- Establish a clear succession planning process for lay leadership
- Clarify and expand the Federation as a platform for community engagement
- Strengthen our overall place in the community

After careful consideration of Federation's current operations, needs and the goals and focus noted, the Federation's Management Team proposed, and ***we are recommending a net increase in Federation's budget by \$174,400*** from resources available as summarized below:

- ***Use of Funds (necessary additions and investments) of \$401,400:***
 - Increase in rental costs of ***\$50,000*** as recommended to the Finance Committee from the Executive Committee in their January meeting and confirmed by Finance Committee at their March meeting
 - Increase in health insurance costs of ***\$40,000*** to cover the projected 12% increase in health insurance costs
 - Increase in the salaries/fringe budget by ***\$191,400*** to create a 3% salary increase pool to be distributed based on merit
 - Invest in NOVA by creating a new position focused on creating a road map and plan for reaching the NOVA community. The cost of this staffing increase is recommended at ***\$100,000*** (fully burdened)
 - Investment of ***\$20,000*** in FRD events and mission support
- ***Source of Funds (changes of budget assumptions to create additional budget funds available) of \$227,000:***
 - Reorient the Jewish Leadership Institute, which we are no longer implementing, to focus on leadership development for Federation and succession planning with a cost savings of ***\$70,000***
 - Increase in funds available from UJEF fees of ***\$94,000***
 - Adjust our assumed savings for turnover to 3% the salary/fringe budget for a savings of ***\$43,000***
 - Reduce budget funds needed for the defined contribution retirement plan by ***\$20,000*** to account for forfeitures previously not accounted for in the budget

- **Continued rollover of special set asides for financial resource development (FRD) program of \$175,000**
 - These funds were approved from prior years funds available for allocation as a special set aside but will remain unspent as of June 30, 2018. Summary of the rollover funds that were set aside with balance to be rolled over noted below:

Program Description	Rollover Balance As of FYE 6/30/17	Projected Date of Use
VP of FRD Succession Planning Leadership Programming	\$125,000	Launch Spring/Fall 2018
Women's Philanthropy Programs	\$25,000	FY 2018/2019
Special event for specific constituency targeted	\$25,000	FY 2018/2019
Total Rollover Funds Available	\$175,000	

- **Confirmation of reduction in holdback from 2.5% to 2%**
 - The Executive Committee asked the Finance Committee to review the proposed reduction in the holdback as part of their budget deliberations. After reviewing historical data about our cash position, our draws on our line of credit, collection rates and our net assets from our financial statements, the Finance Committee believes that the organization is on sound financial footing and confirms the recommended reduction.
 - The Finance Committee would like to study this issue and propose a longer-term recommendation for the appropriate holdback for future years. It hopes to do that by this fall to coincide with the completion of the strategic plan. The goal of this timing is to allow us to increase investment in the organization post strategic plan or to build reserves (for future investment/crisis) or determine that the funds should be allocated through our SP&A process in future years.

This budget recommendation reorients funds and staffing in areas we believe will help us reach the goals noted prior to finalizing the strategic plan and without a full reorganization. In addition, some internal portfolio changes have already been made or will be made which are imbedded in the recommendation. Those changes include:

- Increase capacity/focus by two FRD team members on creating a philanthropic advisory services and strategic initiatives team which would focus on multi-gen philanthropy, DAF servicing, philanthropy advisory services, missions and a special targeted campaign event
- Support of fundraising by SP&A team through the transfer of stewardship and proposal writing
- Restructure of governance, leadership/succession planning and human resources to invest in recruitment and retention by reorienting the leadership development position to a recruitment and retention position and have current team members fulfill the governance and leadership/succession planning role
- Investment in fundraising by creating two 'chief' roles in FRD of Chief Donor Experience Officer and Chief Endowment and Family Philanthropy Officer, creating a Senior Campaign Director, elevating the women's philanthropy open staff position to a Senior Philanthropic Officer and creating a NOVA position to help create a road map for our focus in NOVA

We are investing in areas noted in our goals in hopes to prepare the organization for the future. We see many opportunities in the future and are matching our resources to those opportunities. As we finalize additional organizational changes, we will report those to you as well. Below is a summary of the prior year approved budget and the FY2018/2019 proposed budget and the funding sources for the budget noted.

Department	FYE June 2018-APPROVED Budget					FYE June 2019-FINAL APPROVED Budget				
	Revenue Sponsorships Cover Charges *	Non-Salary	Net Non-Salary Budget	Salary & Benefits (pages 4-5)	Net Budget	Revenue Sponsorships Cover Charges *	Non-Salary	Net Non-Salary Budget	Salary & Benefits (pages 4-5)	Net Budget
Fundraising-Annual Campaign(s) All Divisions including event staffing (pages 6-7)	\$272,000	\$835,300	\$563,300	\$2,321,900	\$2,885,200	\$272,000	\$865,300	\$583,300	\$2,421,900	\$3,005,200
Planned Giving/Endowment Fund (pages 8-10)	\$155,000	\$414,000	\$259,000	\$1,142,900	\$1,401,900	\$155,000	\$414,000	\$259,000	\$1,142,900	\$1,401,900
Rollover Funding for FRD events and programs (page 2)	\$0	\$175,000	\$175,000	\$0	\$175,000	\$0	\$175,000	\$175,000	\$0	\$175,000
Total Fundraising Costs	\$427,000	\$1,424,300	\$997,300	\$3,464,800	\$4,462,100	\$427,000	\$1,454,300	\$1,017,300	\$3,564,800	\$4,582,100
Marketing, Events & Special Programs (pages 10-12)	\$15,000	\$194,000	\$179,000	\$604,300	\$783,300	\$15,000	\$194,000	\$179,000	\$604,300	\$783,300
CGI/SP&A (page13-14)	\$0	\$45,500	\$45,500	\$393,100	\$438,600	\$0	\$45,500	\$45,500	\$393,100	\$438,600
Facilities, Conference Center, Finance and IT (pages 14-15)	\$100,850	\$554,400	\$453,550	\$760,300	\$1,213,850	\$100,850	\$554,400	\$453,550	\$760,300	\$1,213,850
Executive Office, Leadership, Governance and HR (pages 12-13)	\$0	\$291,350	\$291,350	\$850,800	\$1,142,150	\$0	\$241,350	\$221,350	\$850,800	\$1,072,150
Allocated Costs Including Depreciation (pages 14-15)	\$65,000	\$537,300	\$472,300	\$0	\$472,300	\$65,000	\$587,300	\$522,300	\$0	\$522,300
Net Increase in Salaries/Fringe Budget excluding new positions (pages 1-5)	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$168,400	\$168,400
Total Federation and UIEF Costs	\$607,850	\$3,046,850	\$2,439,000	\$6,073,300	\$8,512,300	\$607,850	\$3,076,850	\$2,439,000	\$6,341,700	\$8,780,700
FUNDING SOURCES										
Federation Internal budget					\$7,131,300					\$7,305,700
Rollover Funding					\$175,000					\$175,000
Allocable dollars set aside for UIEF Funding					\$30,000					\$0
UIEF Funding from Fees					\$1,176,000					\$1,300,000
Total Funding Sources					\$8,512,300					\$8,780,700

* Crime charge/felonage-based historical actual numbers from EV16 and EV17

Organizational Budget Detailed Analysis

Salary & Fringe Summary

Program Highlights & Summary

The largest operational cost in Federation's budget is the cost of staffing. Staffing represents over 70% of all our costs. We have a strong, collaborative management team and staff team. The Federation staff is made up of a cadre of committed, passionate, mission-driven professionals who value the role each other plays and welcomes opportunities to collaborate.

As we have noted in the past, having the right staff team is critical. Below is a summary of the team that supports the Federation based on FTEs and budget funds allocated.

Federation Internal Budget & Endowment Fund Budget Summary Salary Budget As of January 2018

Function	Budgeted FTEs	Percent FTEs	FY18 Budget	Percent FY18 Budget
Fundraising-Annual Campaigns	21.76	36.4%	\$2,176,300	35.9%
Endowment Fund	10.54	17.6%	\$1,142,900	18.8%
Events	2.00	3.3%	\$145,600	2.4%
Executive Office/Governance/HR	5.55	9.2%	\$850,800	14.0%
Marketing	7.02	11.7%	\$604,300	9.9%
Finance	5.00	8.4%	\$501,700	8.2%
CGI/SP&A-Local and I&O	4.00	6.7%	\$393,100	6.5%
Facilities, Reception & Conference Center	<u>4.00</u>	<u>6.7%</u>	<u>\$258,600</u>	<u>4.3%</u>
Internal Budget & Endowment Staffing	<u>59.87</u>	<u>100.0%</u>	<u>\$6,073,300</u>	<u>100.0%</u>
Salary & Fringe Budget Federation			\$5,126,300	
Salary & Fringe Budget Endowment			<u>\$947,000</u>	
Total Salary & Fringe Budget Federation/Endowment			<u>\$6,073,300</u>	

**Endowment Fund Budget
Summary Salary Budget
As of January 2018**

Function	Budgeted FTEs	Percent FTEs	FY18 Budget	Percent FY18 Budget
Fundraising	5.34	50.7%	\$649,800	56.9%
Donor Center Support	1.88	17.8%	\$130,000	11.4%
Executive Office/Governance/HR	.47	4.5%	\$84,100	7.4%
Marketing	.75	7.1%	\$65,500	5.7%
Finance	1.60	15.2%	\$167,000	14.6%
Grants	<u>.50</u>	<u>4.7%</u>	<u>\$46,500</u>	<u>4.0%</u>
Endowment Staffing	<u>10.54</u>	<u>100.0%</u>	<u>\$1,142,900</u>	<u>100.0%</u>
Salary & Fringe Budget Funded from Federation			\$195,900	
Salary & Fringe Budget Funded from Endowment			<u>\$947,000</u>	
Total Endowment Salary & Fringe Budget Funding			<u>\$1,142,900</u>	

Although the chart above shows our team by department, cross departmental work is critical to our success. Federation is made up of many integral departments that provide infrastructure, strategy development, planning and implementation, processing, data collection and analysis and much more. Our management team meets weekly to discuss strategy, vision, implementation and tactics. The layout of our office workspace, by design, fosters collaboration. Since we moved to our new headquarters building more than two years ago, we have seen increased collaboration among colleagues of all departments. There is greater communication, enhanced idea generation and sharing and greater comradery and support of each other.

In addition, over the last year, we have focused on team member recruitment and retention and team culture. We reoriented an existing position to focus on this specifically. We are participating in a national Leading-Edge workplace survey this spring to assess how we can continue to invest in our team.

As mentioned above, the proposed salary budget includes the following increases and reductions which net to an increase of \$268,400 in our salary/fringe budget:

- Create a salary increase pool distributed based on merit of 3% at a cost of \$191,400. We have not had salary increases for 2 years. Research on area organizations suggests that they are using 3% as their target
- Invest in a new position to focus on creating a roadmap for our work in Northern Virginia at \$100,000
- Increase our health insurance costs by \$40,000 based on a projection of a 12% increase in costs
- Adjust assumed saving for turnover based on our experience we are projecting 8 separations open one third of the year. This will reduce the budget by \$43,000 - 3% of the salary/fringe budget
- Reduce pension budget for historical forfeitures for a savings of \$20,000

Fundraising Annual Campaign(s) Summary

Program Highlights/Summary

FRD is a department of Federation that is chaired by the Vice President of Financial Resource Development and the primary responsibilities of the department include:

- Develop and implement a comprehensive fundraising model from all income streams with a goal to increase total resource development and the donor base
- Implement processes and procedures to effectively manage the fundraising operation
- Build and maintain relationships with donors and prospects at all levels
- Cultivate leadership for both FRD and the entire organization
- Provide fundraising guidance and advice to partner agencies, as needed
- Develop cohort programs to build micro-communities which has proven to be the most effective way to engage more people in a meaningful way which then yields significant increased resources such as done with missions

The FRD department is divided into four main campaign areas. The divisions work collaboratively on programming, focus together on how to increase the donor base by being an entry point into Federation for new donors and how to increase current donors' total giving moving them up through different giving levels. Each of these divisions has leadership and committees and the role of each division is outlined below:

- **Philanthropic Leadership** – Works with donors and prospects giving or that have the capacity to give \$10,000 or more and deepen their connection to Federation. Focuses on a holistic approach to philanthropy including the annual campaign, directed and planned giving. Attempts to match donors' interests with communal needs and much of solicitations are done face-to-face. Creates programs and opportunities to say thank you to the highest-level donors through giving levels of \$10,000, \$25,000, \$50,000 and \$100,000. Budget resources are primarily devoted to event costs, research tools and meeting/travel costs to visit and cultivate donors.
- **Network** – Works with donors giving between \$1,000 and \$9,999 and prospects that have the capacity to give in this range. Creates programs and opportunities to engage business and civic community leaders through thank you, outreach and upgrade events. Solicitations are handled through a combination of face-to-face solicitations, phone calls or e-mails from volunteers and telemarketing, personalized and direct mail. Budget resources are primarily devoted to event costs and meeting/travel costs to visit and cultivate donors.
- **Women's Philanthropy** – Works with women who are giving or who have the capacity to give at least \$1,000. Through the Lion of Judah program, there is a focus on women giving at the \$5,000 level and other Lion levels at \$10,000, \$18,000, \$25,000, and \$100,000. Provides opportunities for women to network with each other, take on leadership roles, volunteer and deepen their connection to Federation. Women's Philanthropy facilitates events which serve as an outreach tool to engage new women with Federation and they provide thank you events for current donors. Leadership development and volunteer opportunities are also offered to women through Women's Philanthropy. Budget resources are primarily devoted to event costs and meeting/travel costs to visit and cultivate donors.
- **Young Leadership** – Works to engage young adults ages 40 and younger through events, missions including Birthright, volunteering and leadership development and educational programs. An emphasis is placed on teaching young adults the importance of giving and developing as Jewish leaders. There is a focus on learning and education. A giving level exists at the \$1,000 level called Ben Gurion Society that has been utilized as an effective pipeline to grow National Young Leadership Cabinet Membership at the \$5,000 level. Solicitations are done through a combination of face-to-face solicitations, phone calls or e-mails from volunteers, events, and personalized mail.

The Department is also focused on prospect research to help identify new donors or people who are giving under capacity to Federation. A pipeline list has been created and managed and prospect research remains an effective tool for both the professional team and senior volunteer leadership.

The FRD Department also has a role in all major events and initiatives for the Federation to ensure that there is appropriate follow up and connection to Federation's fundraising effort. For example, the FRD department collaborates

with the Good Deeds Day team to ensure the right chairs are selected, all data collected from volunteers is entered into the database, solicitations happen as appropriate and any other necessary follow-up to connect back to FRD and engage new volunteers with Federation. Large scale events like Grand Slam Sunday and Imagine Israel have been used as pilots to test adding a required gift to the ticket price for the events. This will be evaluated over the course of two years. As discussed earlier in the recommendation that is why it is critical we continue to invest in both data analytics as well as a pivoting our engagement programs.

The key to the success of Federation's fundraising efforts is having the operations necessary to process and acknowledge all gifts. The FRD Donor Relations Department handles the following for the organization:

- Gift processing and acknowledgments
- Billing
- Reporting and analysis
- Database management

These are important functions of the organization and ensure Federation continues to maintain its level of excellence. The resources dedicated to the FRD operations noted below support this function. The primary costs in this area are the outsourced caging operations that support our gift processing and the costs of our billing/acknowledgment printing and mailing.

In addition, while the Community Donor campaign (direct response budget noted below) is managed through the Marketing Team, it is a function of the campaign and fundraising and works in partnership with the campaign team. The Community Campaign is responsible for direct mail, telemarketing and e-solicitation for donors giving less than \$1,000 and some who give slightly more. Resources in this area devoted to outsourcing of those functions (especially telemarketing), the mailing/postage costs for our direct mail and the management and support donor acquisition and stewardship programs.

It is also important to note that in the summary budget below functions that are listed with a \$0 amount are areas where we run programs only with donor funding or grants where the net cost to the internal budget is zero. They are listed for informational purposes only.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

Campaign General	Net Proposed Budget	FRD Operations	Net Proposed Budget	FRD Approved Programs set aside from prior year's budget	Net Proposed Budget
Campaign General & Campaign Mktg	56,500	FRD Operations General	10,000	Program	125,000
Missions & Mission Subsidies	55,000	Caging Operations & Billing	47,500	Women's Philanthropy Programming	25,000
NOVA	5,000	Database	145,500	estate	25,000
Total Division Budget	116,500	Total Division Budget	203,000	Total Division Budget	175,000
Philanthropic Leadership	Net Proposed Budget	Women's Philanthropy	Net Proposed Budget	The Network	Net Proposed Budget
Philanthropic Leadership General	21,400	Women's Philanthropy General	22,800	Network General	14,000
Philanthropic Leadership Events	0	Lion of Judah	4,000	Network Events	0
Total Division Budget	21,400	Total Division Budget	26,800	Total Division Budget	14,000
Direct Response	Net Proposed Budget	Next Generation/YL	Net Proposed Budget	TOTAL non-salary budget excluding rollover funds 583,300	
Direct Mail & Telemarketing	110,000	Next Generation/YL General	11,600		
E-Philanthropy	40,000	ConnectGens	0		
Community Events	20,000	Impact DC	0		
Acknowledgements	8,500	Birthright Israel	0		
Data Projects	6,500	Other YL Events	0		
Dial-a-thons	5,000				
Total Division Budget	190,000	Total Division Budget	11,600		

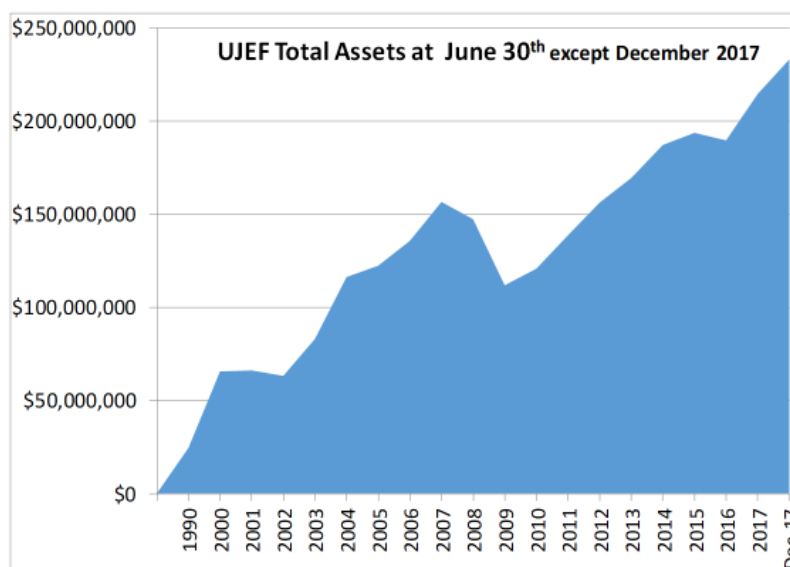
Endowment Fund Summary

Program Highlights/Summary

Federation's United Jewish Endowment Fund's (UJEF's) goal for the future has been to increase the total resources invested in UJEF for three main purposes:

- long term future health of the community
- ability to grant more funds into the community
- more investable assets allow for better diversification and allows UJEF to grow for the future

To reach that overarching goal, UJEF created a long-term fundraising goal in December 2016 to increase total assets managed by UJEF to \$250 million (from \$206 million) and Federation expectancies to \$100 million (from \$46 million) by December 31, 2020. Below is a chart showing UJEF's growth:



To reach the fundraising goals, we have been focusing on 3 constituencies as noted below:

- Working with individual and family donors through
 - Active involvement of the Federation's Create a Jewish Legacy Team
 - Implementing a donor longevity program to recognize length of years of giving to the Annual Campaign and identify and encourage legacy prospects at all giving levels
 - Continuing our Multi-Generational Philanthropy Program
 - Implementing a professional relationship manager to ensure greater touches with our donors throughout the year
 - Developing tools, reporting, and implementation strategies for linking current fund holders to multiple project and impact areas, deepening relationships through multiple layers of engagement
- Working with Agencies/Synagogues/Organizations
 - Continue to maintain a sales pipeline for organizational funds to track prospective dollars, relationships, and interactions who could create an Agency Investment Fund
 - Work with CJL partners on an individualized basis to help them develop, maintain and grow their internal legacy program and grow financial resources for the entire community
- Working with Professionals
 - Continue to focus on face-to-face meetings with seasoned estate planning professionals
 - Engage all members of the Allied Professionals Roundtable in at least one other area of Federation's work

We are investing our non-salary budget in programmatic areas to further the work of the UJEF team in reaching the constituencies noted above. Detailed program descriptions and budgets are as follows:

- **Donor Recognition & Legacy Society Event**-UJEF recognizes and honors UJEF Legacy Society members (donors with known legacy commitments of \$10,000 or greater) through recognition events and formal donor recognition programs (holiday card mailing, invitations to special programs, new member welcome gift, etc). Recognition events provide an opportunity for our Legacy Society members to mingle with each other and for us to personally thank them for their support. Lion of Judah Endowment (LOJE) donors continue to be invited to Lion of Judah events, and a separate marketing piece to honor LOJE donors is being considered. Legacy Society members at certain threshold levels are invited to certain campaign events during the year.
- **Create a Jewish Legacy (CJL) Federation**-UJEF/Federation manages its own CJL team, responsible for promoting legacy gifts with our Federation annual campaign donors. The team's focus is to engage in legacy conversations with prospects and increase the number of planned gifts, such as Perpetual Annual Campaign Endowments, Lion of Judah Endowments and other permanent endowments. CJL professionals on our team also offer assistance to local synagogues and Jewish organizations in launching and sustaining planned-giving campaigns. UJEF is currently working with over 30 local synagogues and organizations at varying levels of support through its CJL Program. In addition to our regular Legacy Newsletter, we have been offering training in areas such as marketing, stewardship, and legacy donor recruitment best practices. One-on-one consulting is available to assist these organizations in building and maintaining their legacy programs.
- **Multigenerational Family Philanthropy**-In 2014, UJEF received support from the Multigenerational Family Philanthropy program, sponsored by the Jewish Federations of North America, to begin developing the Next Gen Philanthropy Program for wealth inheritors in our community who are 25-35 years old and have significant philanthropic potential. We engaged leadership to chair the program, developed a program curriculum in partnership with Multi-Generational Family Philanthropy experts at 21/64 and Rabbi Shira Stutman of Sixth and I Historic Synagogue. We raised more than \$150,000 from private donors in the form of sponsorships to cover the costs of the program. The program launched in August 2015 with 19 individuals and concluded in May 2016 with a participant-driven plan for continued education supported by UJEF. Cohort II launched in 2017 and ran through 2017/2018. With the success of the Next Gen Philanthropy Program, a market has been identified among other generational cohort groups to engage in peer-level conversations about philanthropy and philanthropic planning. Federation professionals are facilitating multigenerational family philanthropy training with other Federation team members and have expanded the families we are working with on philanthropic succession planning.
- **Allied Professionals**-Estate planning attorneys, accountants, financial planners, life insurance agents, investment advisors and other planned giving professionals ("allied professionals") are critical partners in creating a donor's philanthropic legacy. UJEF meets with seasoned allied professionals, either one-on-one or with small practice groups within estate planning firms, to create or enhance our relationship with them. We will continue to build these relationships over the next year. The Professional Advisor Alliance Roundtable is an initiative for emerging professionals (3-10 years of experience) in the estate planning, insurance, accounting, financial planning, investment advisor and tax and wealth management professions. On the 3rd Tuesday of every month, a member of the group hosts a gathering at his/her office to explore a topic of relevance. Each conversation includes discussion about the importance of philanthropic planning and advising. Through this program, the UJEF ensures that it is front of mind as these promising professionals work with clients and that these professionals are prepared to speak to their clients about planned giving.
- **Tikkun Olam Women's Foundation**-The Tikkun Olam Women's Foundation ("TOWF") is a multi-generational grant making organization dedicated to creating social change for women and girls. The Foundation, rooted in Jewish values, empowers women to be philanthropists, decision makers, and advocates on behalf of women of all ages. UJEF continues to invest \$20,000 in this worthy program.
- **General Costs and Allocated Costs**-The general expenses of UJEF include technology support, graphic design, advertising, printing, marketing, donor communications, telephone service, postage, travel, continuing education, support for UJEF lay governance and other such operating costs. The largest operational cost in the general expense budget is for the software used to manage the fund operations and website. This service is currently provided by Stellar Technology Solutions. The endowment software tracks all fund activity for donor reporting, recognition, grant making, and financial accounting. We continue to work with Stellar to update our

system to make it as robust as possible and continue to explore options for other systems. Allocated overhead costs are charged by Federation to all departments and divisions of the Federation based on a prescribed formula. These costs include general overhead including occupancy, telephone, duplicating, audit fees and computer support. Historically, the allocated costs charged to UJEF were not based on the formula but were fixed at a flat \$95,000.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

Endowment General	91,000
Donor Recognition & Legacy Society	30,000
Create a Jewish Legacy	20,000
Multi Gen Family Philanthropy	18,000
Allied Pros	5,000
Allocated Occupancy	95,000
Total Endowment	259,000

Marketing, Special Programs, Events & Community Engagement Summary

Program Highlights & Summary

The Federation's Marketing Department oversees the messaging, communications, special events, public relations and community engagement efforts for the organization. Its efforts support all areas of our organization. It has oversight by the Chief Marketing Officer and the Vice President for Marketing. The main responsibilities for this department include but are not limited to:

- **Brand Oversight** – Federation's brand development and implementation is the responsibility of the Marketing Department. Its staff is highly trained professionals who work with fellow colleagues, lay leaders and other stakeholders to ensure the integrity and consistency of brand messaging in all the organization does.
- **Strategic Marketing** – The marketing team partners with professionals throughout Federation to determine the most thoughtful and meaningful approach to the marketing of the organization and its efforts to bring more donors, volunteers, community partners and supporters to the table. We work together to set strategy plans which work in tandem to help us achieve our goals.
- **Public Relations** – The marketing department works with the public relations firm to push content to the media that has the best chance of being covered in the mediums of print, radio, television and internet.
- **Special Events** – The special events team manages the logistics for more than 100 Federation events each year ranging from small parlor meetings in homes to large scale community programs like Routes, the Early Childhood Education Conference and Good Deeds Day. They work in partnership with Federation colleagues, lay leadership, vendors and community partners to ensure a high-quality event is executed each time.
- **Graphic Design** – Responsible for the conceptualizing and design of all Federation marketing materials including fliers, invitations, reports and other printed materials and electronic materials.
- **Website** – The marketing team manages, updates and oversees all Federation website projects including: the main Federation site, Create a Jewish Legacy, Jewish Food Experience and JConnect.
- **E-communication** – Leads the strategic thinking and implementation of Federation's e-communications including e-blasts (educational, invitations, crisis), e-newsletters and fundraising blasts in partnership with the FRD department.
- **Social Media** – Leads the organizations efforts surrounding social media both as drivers of content, managers of platforms and supporters and encouragers of the professional and lay leadership implementation of this work.

During this fiscal year, Federation created the Department of Engagement. This new department encompasses the work of Jewish Food Experience (JFE), JConnect/Doing Good, PJ Library and Interfaith Families. The intention and purpose of the change was to create synergies in this work. We hired a Director of Engagement to lead a team that focused on four goals: 1) creating alignment and overarching synergies for our engagement work ensuring meaningful and deep impact as a result of this work; 2) work with a consultant (Rosov Consulting) in order to build a metrics deck that will be overlaid on each program in order to begin to track and report out meaningful metrics that articulate true impact for each program; 3) Find ways to use our engagement programs as a gateway for participants to learn about the offerings of Greater Washington Jewish life in hopes of encouraging greater participation and connection. 4) Create additional pathways to support cultivation and stewardship of Federation donors.

- **JFE**-Since before its inception, Federation’s Chief Marketing Officer has served as the Managing Director of this project. Now, JFE is supported by the new Director of Engagement and a governing leadership team. There are many avenues of lay involvement in JFE including more than 55 individuals at multiple levels. The Jewish Food Experience was initially funded by Federation’s United Jewish Endowment Fund because of a new allocations model which had them looking for a way to make a greater impact on the community by creating a “start-up venture” focused on using the theme of food to create a connection among Jews in Greater Washington. This program included a robust website, programming throughout the community, a grants program which makes funds available to community partners for food related programming and numerous ways to be used as a platform for raising designated dollars for The Federation. The program will soon conclude its fifth year. As JFE continues to search for consistent funding to maintain its current program plan and website, a scaled back model will be presented during the 2018-19 fiscal year. We anticipate our work with Rosov Consulting will create impact metrics to allow us to clearly understand and articulate how JFE is supporting the Jewish community and therefore be used to make the case to secure annual funding. It is anticipated that in 2018-19, approximately \$25,000 of the full budget will be funded from a UJEF Grant and \$30,000 will be funded from the Annual Campaign. The rest of the budget is funded by donor directed funds (not internal budget funds). In addition, Federation provides in kind support to the project through the staffing support provided by the CMO, COO, CDO and full marketing staff as well as others to support the venture.
- **Jconnect** – The JConnect program is supervised and managed by the Director of Engagement. JConnect serves as one of the many outreach and engagement programs of Federation. Jconnect’s budget is made possible thanks to an allocation by SP&A. The Jconnect Director’s primary role is to support the operations of Jconnect. Jconnect has three primary focuses of work:
 1. Serve as project lead for all Federation led large scale community events (ie: Routes, Good Deeds Day, Jewish Community Day at Nationals Park)
 2. Support the Jewish community resource website that connects members of our community to a plethora of Jewish community knowledge all in one location
 3. Facilitate and manage Federation’s “Doing Good with Federation” initiative and act as the expert on volunteering through a Jewish lens for the entire community. Doing Good provides volunteering opportunities to a wide variety of participants and target audiences. Doing Good also showcases online resources focusing on where to find volunteer experiences within our Jewish agencies, institutions and community programs. In the coming year, Doing Good will offer *Doing Good Guides*, a new online resource that maps how to create small group and personal volunteer experiences within a Jewish framework.
- **PJ Library**- PJ Library in Washington DC is also managed and supervised by the Director of Engagement. It has three primary focuses of work:
 1. Support families raising Jewish children to enhance their Jewish learning, bring more Judaism into their lives and connect to the Jewish community by providing a **FREE** treasury of Jewish books and music for kids ages 6 months-12years. Every month, families enrolled in PJ Library and PJ Our Way receive a high-quality, expertly-selected and kid-tested Jewish book or CD as a gift from the community.
 2. Provide a plethora of engaging programming with a Jewish framework for families with young children throughout DC, NoVA and Montgomery County. Eighty percent of PJ Library programs are coordinated with community partners therefore supporting agency relationships and offering expert resources.
 3. Provide online resources for families with young children as well as initiate ongoing communication to help steward and cultivate this population’s Jewish life journey.

As noted above, resources are invested in marketing consist of website support and maintenance, graphics support and other consulting such as PR, advertising and printing costs as noted below. Again, it is important to note that functions that are listed with a \$0 amount below are areas where we run programs only with donor funding or grants where the net cost to the internal budget is zero. They are listed for informational purposes only.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

Marketing	Net Proposed Budget
Marketing General	48,500
Branding	30,000
Public Relations	42,000
Events	5,000
Advertising	15,000
Good Deeds Day	8,000
Internet Support	21,000
Letterhead/Annual Report	9,500
Jewish Food Experience	0
Jconnect	0
PJ Library	0
Grand Slam Sunday	0
Total Marketing	179,000

Executive Office, Governance, Leadership and HR Summary

Program Highlights & Summary

Governance for the Federation is the purview of the Federation President, who convenes the Board of Directors at least five times per year and the Executive Committee at least ten times per year. These governing bodies establish goals and set policy. Executive Committee and Board members are selected through a nominating process that is designed to attract enthusiastic and skilled leaders.

Federation strives to have a well-informed and highly engaged Board of Directors. Towards that end, the team will also support the Vice President for Leadership and Volunteer Development to cultivate exceptional volunteer and professional leaders. This is one of the most significant challenges faced by Federation. Several ways we look to address this need include:

- We will continue to focus on how to better identify, track and develop lay leaders
- Continue volunteer development and training opportunities for Board and Executive Committee members
- Identify more pathways for involvement
- Create and a clear multi-year succession plan for Federation leaders by utilizing the Vice President of FRD program model as a guide (noted earlier in the presentation) and ensure we have a pipeline of all Executive Committee members more than a year in advance
- Expansion of onboarding for new Federation employees to help ensure excellent training and workplace culture along with the creation of common language
- Creation of innovative and engaging monthly meetings to support professional development for Federation staff
- Strive to be one of the best places to work in the DC metro region

Resources are invested in this area as noted below. In the Executive Office, funds are allocated primarily to catering for governance meetings, printing, mailing and local/out of town travel.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

	Net Proposed Budget
Executive Office, Governance, Leadership & HR	
Executive Office General	123,200
President's & CEOs Discretionary Fund	10,000
Governance	11,250
Annual Meeting	20,000
HRD Lay Leadership General and Education	5,000
Internal Human Resources	51,900
Total Executive Office, Governance, Leadership & HR	221,350

CGI/SP&A Summary

Program Highlights & Summary

CGI/SP&A is the planning committee of Federation that is co-chaired by the current Vice Presidents of Local Planning and Israel & Overseas. It was created to:

- Identify major local, Israel and overseas issues, establish priorities in consultation with the Executive Committee, partner agencies and community stakeholders, and appoint Task Forces to research, conduct evaluation as needed and recommend action.
- Recommend for Executive Committee approval major areas for planning focus and action.
- Receive regular agency updates and reports from planning Task Forces on progress and issues.
- Recommend allocations and planning strategies to Executive Committee.
- Leverage Planning Committee volunteers' extensive knowledge about community partners and issues to enhance FRD.
- Receive requests to become a Federation partner agency as well as consider and recommend defunding of agencies as needed.

The CGI/SP&A Committee/Department:

- Convenes, collaborates and builds community with programs and initiatives such as Imagine Israel, Israel Engagement Fellowship, J Teen Philanthropy, Disability Inclusion Survey Tool, j.familyambassador, Interfaith Family DC, bringing in Moishe House as a partner agency, Congregational Shlichim Program.
- Has expanded initiatives that benefit synagogues which has helped establish Federation as a valuable partner in the community.
- Provides additional resource development opportunities created because of thoughtful community planning and innovative approaches driven by both Federation and donors, such as InterfaithFamily/DC, RavTech, The Teen Israel Engagement Fellowship, Jewish approaches to addiction awareness, and early childhood professional development

In addition to the CGI/SP&A Committee, there are several ongoing committees and Task Forces (time limited) dealing with identified subject areas as deemed necessary. These committees focus on key issues facing our local and overseas communities, commission research as needed, and work with “coalitions of the willing” to develop clear identifiable outcomes and actionable strategies. These committees also respond to emerging and/or emergency issues confronting our community and partner agencies. For example:

- Israel Engagement Committee: Developing goals and strategies to significantly expand our local community’s engagement with the land and people of Israel
 - Implement Federation’s new *Imagine Israel* engagement platform
 - Identify, recruit and implement the expanded Congregational Shlichim initiative
 - Work collaboratively with communal organizations, congregations, the Embassy of Israel, and the Israeli American Council to maximize our community’s engagement with Israel

Resources are invested in CGI/SP&A in consulting primarily for task force research and other planning initiative support, out of town travel for I&O support and the costs to support our shlichut program as noted below. Again, it is also important to note that functions that are listed with a \$0 amount below are areas where we run programs only with donor funding or grants where the net cost to the internal budget is zero. They are listed for informational purposes only.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

CGI/SP&A	Net Proposed Budget
Community & Global Impact General Support	20,500
Schlichut, Israel Office	25,000
Task Forces	0
Total CGI/SP&A	45,500

Finance, IT, Facilities & Other Allocated Departments Summary

Program Highlights & Summary

The ‘back office’ infrastructure is essential to the financial and operational integrity of any the organization. Finance, IT, Facilities and other allocated departments are the ‘back office’ back bone of Federation. As you know, there has been a focused intentionality on business discipline which has led to a stronger and healthier organization. We have a more stable cash position and have been off our line of credit at least 3 months of the year for the last two years. Our collection rates have increased from 97.5% for all gifts three years to 99% in two years.

In all areas of the organization, we consider outsourcing as a valuable practice. Certain aspects of our work are better facilitated through outsourcing. Some of these areas include: IT, public relations, security guard support of the Jewish community campus, auditing, payroll services, account payable management, telemarketing, donor service transactions under \$5,000, etc. In cases where hiring an expert in house would not be cost effective, outsourcing has provided us a way to use great talent, establish greater efficiency and obtain strong expertise at a fraction of the cost. These departments manage multiple areas of the organization and include:

- Develops/reviews policies and procedures for each area
 - Human Resources
 - Information Technology (IT)
 - Finance
- Focuses on elevating our customer service to donors, vendors, staff, etc.
- Anticipates problems and proposes resolution
- Safeguarding organizational assets
- Continually reviewing costs and possible reductions in costs especially in the IT, telephone, duplicating areas
- Manages operating risks including insurance coverage
- Develop strategies and solutions for addressing challenges and opportunities
- Financial
 - Oversight of cash management and banking relationships
 - Produces reports for internal use and presentation to the board and other governance bodies that is accurate and complete
 - Developments, reviews and recommends through lay leadership the annual budget to governance bodies
 - Recommends allocable dollars through review and approval of the funding projection
- Manages organizational audits
- Manages building and conference center

Resources are invested in this area as noted below. In the Finance Department, the biggest cost is the cost of Federation's audit. IT is fully outsourced at a cost of about \$245,000. Therefore, most of the IT, telephone support and duplicating budget is used for that contract. The rest of the IT and duplicating resources are used for equipment rentals, telephone costs, data infrastructure including a colocation facility for our servers and repair/maintenance costs. There are no non-Federation LLC building operations included in the budget. The costs that are included in the internal budget for the headquarters building are the rent we pay to the LLC for the building, costs to run the conference center and rental income offsets for usage of the space and costs of new equipment/ furniture which is included in the depreciation budget.

Also, please note that functions that are listed with a \$0 amount below are areas where we run programs only with donor funding or grants where the net cost to the internal budget is zero. They are listed for informational purposes only.

Summary Non-Salary Budget (salary budget enumerated on pages 4-5)

	Net Proposed Budget
Finance, IT, Facilities, Other Allocated Departments	
Information Technology, Telephone Support & Duplicating	344,750
Finance	103,650
Facilities	5,150
Campus Security	0
<i>Subtotal Finance, Facilities & IT</i>	<i>453,550</i>
Occupancy	288,300
Depreciation	234,000
<i>Subtotal Occupancy & Depreciation</i>	<i>522,300</i>
Total Finance, IT, Facilities, Other Allocated Departments	975,850

Community Study Highlights

2017 GREATER WASHINGTON JEWISH COMMUNITY DEMOGRAPHIC STUDY



The Jewish Federation
OF GREATER WASHINGTON

Cohen Center
for Modern Jewish Studies

Steinhardt
Social Research Institute

Brandeis
University



THE MORNINGSTAR FOUNDATION

AUTHORS: JANET KRASNER ARONSON MATTHEW A. BROOKNER MATTHEW BOXER LEONARD SAXE

Executive Summary

The 2017 Greater Washington, DC Jewish Community Demographic Study provides an up-to-date description of the size and character of DC-area Jewish adults, children, and households. Developed to provide communal leaders, planners, and members with actionable information, the study findings can be used to enhance the quality of life in the community and increase Jewish engagement. The Cohen Center for Modern Jewish Studies and the Steinhardt Social Research Institute of Brandeis University conducted the study, with funding from The Morningstar Foundation and in collaboration with the Jewish Federation of Greater Washington. Interviews with over 6,600 Jewish households residing in the District of Columbia, Northern Virginia, and Suburban Maryland form the basis of the report.

Key findings of this study include:

Greater Washington, DC's Jewish community numbers nearly 300,000 Jewish adults and children in over 155,000 households. As defined by federation catchment areas, it is the third largest Jewish community in the United States. Greater Washington, DC's Jews constitute about 6% of the area population. The Jewish community's size has grown by 37% since 2003.

Metro DC's Jews are younger than the national Jewish population. The median age of all Washington area Jewish adults is age 45, younger than the median age (50) of Jewish adults nationally. Compared to the national Jewish population, the Washington-area Jewish community has proportionally more adults ages 30-39 and fewer who are ages 40-64.

The community is diverse. Seven percent of Jewish adults identify as LGBTQ, and 7% as a person of color or Hispanic/Latino. Among households with **married or partnered Jews**, 53% of couples include someone who does not identify as Jewish.

A greater share of Metro DC's Jews are Democrats compared to Jews nationally. Nearly three-quarters (72%) of Metro DC's Jews identify as Democrats, 6% as Republicans, 15% as independents, and 8% other. Nationally, 54% of Jewish adults identify as Democrats, 14% as Republican, and the remaining 32% as independent or other party affiliation.

Greater Washington Jewish Community Population Estimates, 2017

Total Jews	295,500
Adults	
Jewish	244,500
Non-Jewish	70,900
Children	
Jewish	51,000
Non-Jewish	9,100
Total people	375,500
Total households	155,200

Geographic Distribution

The geography of the greater Washington, DC Jewish community includes all of the District of Columbia; Suburban Maryland (Montgomery and Prince George’s counties); and Northern Virginia (Fairfax, Prince William, and Loudoun counties, Arlington county/city, and the cities of Alexandria, Fairfax, Falls Church, Manassas, and Manassas Park). The distribution of Jewish households and individuals in the District of Columbia, Suburban Maryland, and Northern Virginia is shown in Table ES.1.

The District of Columbia is home to 19% of area Jews. Over one-third of DC’s Jews are between ages 30 and 39. Forty percent have lived in the area for less than ten years. Just 16% of households include children ages 17 or younger. Nineteen percent of DC’s Jewish households are synagogue members.

Suburban Maryland is home to 39% of area Jews. Almost two-thirds (63%) of Suburban Maryland’s Jews are ages 50 or older. Over three-quarters (76%) were born or raised in the DC area or have lived there for 20 years or more. Just under one-quarter (24%) of households include children ages 17 or younger. Over one-third (34%) of Suburban Maryland Jewish households are synagogue members.

Northern Virginia is home to 41% of area Jews. Half of Virginia’s Jewish adults are under age 50. Half were born or raised in the DC area or have lived there for 20 years or more. Over one-quarter (26%) of households include children ages 17 or younger. One-quarter of Northern Virginia Jewish households are synagogue members.

Despite the perception of DC as a “transient community,” **94% of Jews consider the Metro DC area to be their “home base.”** Three-in-five Jewish adults have no plans to move; 22% plan to move to another location within Metro DC; and 17% plan to leave the DC area. One-quarter of Jewish adults have lived in Metro DC for fewer than 10 years, 18% for 10-19 years, and 49% for 20 years or longer.

Table ES.1 Summary of Jewish population by region

	DC	Suburban Maryland	Northern Virginia	TOTAL
Jewish Households				
number	34,600	56,900	63,700	155,200
percent	22	37	41	100
Jewish individuals				
number	57,300	116,700	121,500	295,500
percent	19	39	41	100

Children

Overall, 85% of **children in Jewish households** are being raised Jewish in some way. Seventy-six percent are being raised exclusively Jewish, either by religion (45%) or culturally (31%). Among children with intermarried parents, 61% are being raised exclusively Jewish, with 19% being raised Jewish by religion and 42% being raised culturally Jewish.

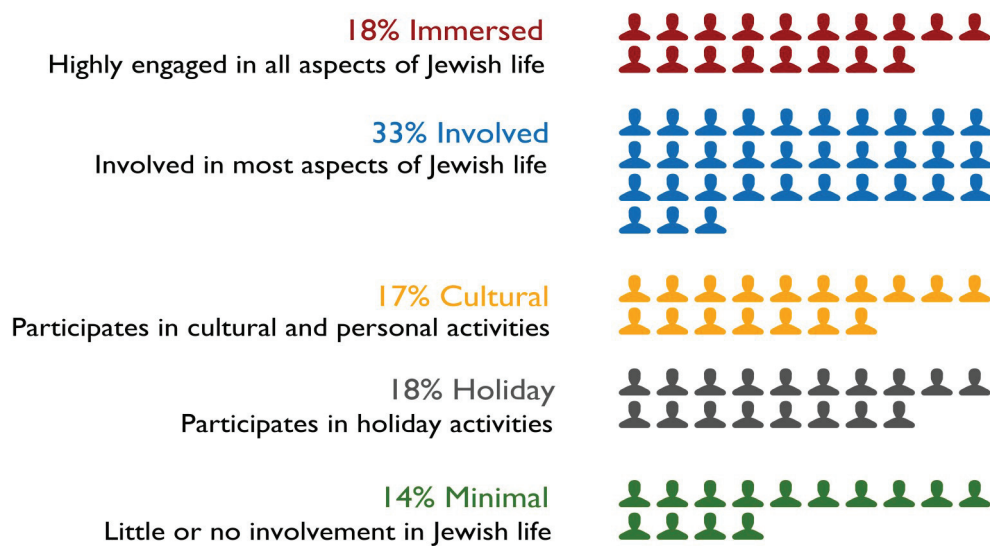
Forty percent of **Jewish children in grades K-12** are enrolled in Jewish part-time school or Jewish day school. Just 7% of Jewish children ages 0-5 are enrolled in Jewish preschool. In total, 31% of Jewish children are enrolled in some form of Jewish education.

Jewish Engagement and Synagogue Membership

Jewish behavior includes family and home-based practices, ritual practices, personal activities, and organizational participation. Looking at an index that combines multiple measures of Jewish life, members of the Metro DC Jewish community can be thought of as having one of five **patterns of Jewish engagement**, as shown in Figure ES.1. These groupings provide a deeper way to understand Jewish engagement aside from denominational affiliation and ritual behavior.

Metro DC Jews are less likely than US Jews overall to identify with a specific denomination. Over one-third (39%) of Metro DC Jews indicate that they have no denomination, compared to 30% of all US Jews. This is the case for Jews in all age brackets.

Figure ES.1 Patterns of Jewish engagement



In the Metro DC Jewish community, 26% of households belong to a synagogue or another Jewish worship community of some type. In terms of Jewish adults, levels of synagogue membership in the Metro DC area (31% of Jewish adults) are lower than that of the rest of the country (39%).

The largest group of synagogue members (18% of households) are dues-paying members of local “brick-and-mortar” synagogues. The number of member households in these synagogues has declined slightly since 2003 and has not kept pace with community growth.

The remaining synagogue members (8% of households) belong to independent minyanim, Chabad, or non-local congregations, or consider themselves members of brick-and-mortar synagogues but do not pay dues.

Israel

Approximately two-thirds (68%) of Washington-area Jews have been to Israel or have lived there. Nearly one-third (30%) have been to Israel once. Another third (31%) have been to Israel more than once, and 7% have lived there at some point, including the 4% of Washington-area Jews who are Israeli. This figure represents a substantially higher proportion than among US Jews in general, of whom in 2013, 43% had been to Israel.

One-third (34%) of Washington-area Jews feel very connected to Israel. By contrast, 14% feel not at all connected.

Community

Jewish community ties are not central to Washington-area Jews. Just over one-quarter (28%) feel that being part of a community is an essential part of being Jewish. One-third (33%) feel very connected to the global Jewish community, and 15% feel very connected to the local Jewish community. However, 60% say at least half of their closest friends are Jewish.

Forty-one percent of Jewish adults did some volunteer activity in the past month, either with Jewish or non-Jewish organizations. Volunteers included 15% of Jewish adults who volunteered with at least one Jewish organization and 32% who volunteered for at least one non-Jewish organization. In all, 6% of Jewish adults volunteered for both Jewish and non-Jewish organizations.

For volunteering and charitable donations, the **most popular cause among Metro DC’s Jews is education:** 86% say it is very important. Other causes of interest are social justice (76%) and politics (64%).

Eighty-seven percent of Jewish adults made a charitable contribution in the past year. Of all Jewish adults, three-fifths (61%) donated to at least one Jewish organization, and half (51%) donated to a Jewish organization that primarily serves the DC area.

Health and Financial Well-being

The majority of DC-area Jewish households are financially comfortable, with 45% describing their standard of living as being prosperous or very comfortable, and another 44% reporting they are reasonably comfortable. Another 10% of households described themselves as “just getting along.” A total of 1% indicated they are “nearly poor” or “poor.”

Economic insecurity may be a concern for some Jewish households. Thirteen percent of Jewish households do not have enough savings to cover three months of expenses. In addition, 5% of households reported that at some point in the past year they were unable to participate in Jewish life because of financial constraints.

An estimated **18% of Jewish households include someone with a health limitation.** These households include at least one person who has a limitation on the amount or kind of work, school, or housework they can do because of an impairment, disability, chronic physical problem, or mental health issue.

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The Jewish Federation
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Agencies & Community Partners List



OUR COMMUNITY PARTNERS AGENCIES & PARTNERS

Federation thanks our partner agencies and programs for their collaboration and commitment in addressing the needs of our Jewish community.

LOCAL SERVICE NETWORK

- Bender JCC of Greater Washington
- Capital Camps & Retreat Center
- Charles E. Smith Life Communities*
- Edlavitch JCC of Washington DC
- Garden of Remembrance*
- Jewish Coalition Against Domestic Abuse
- Jewish Community Center of Northern Virginia
- Jewish Community Relations Council of Greater Washington
- Jewish Council for the Aging
- Jewish Foundation for Group Homes
- Jewish Historical Society of Greater Washington
- Jewish Social Service Agency
- Moishe House
- Sulam

LOCAL COMMUNITY PROGRAMS

- Coming of Age (MD and VA)
- Federation's Department of Jewish Life & Learning
- Federation's Jconnect
- Federation's Jewish Food Experience®
- Federation's JTeen Philanthropy Program
- GatherDC
- Honeymoon Israel
- Initiative in Congregational Education
- Interfaith Initiatives Grants Pool
- Israel at 70 Celebration
- Israel Engagement / Imagine Israel
- Israel Quest
- j.family Ambassadors
- Jewish Leadership Institute
- Jewish Millennial Engagement Project
- Jewish Rock Radio
- Jewish Women's Renaissance Project
- Jews United for Justice
- One Happy Camper
- One Table
- PJ Library®
- Tzedek DC

JEWISH DAY SCHOOLS

- Berman Hebrew Academy
- Charles E. Smith Jewish Day School
- Gesher Jewish Day School of Northern Virginia
- Milton Gottesman Jewish Day School
- The Torah School of Greater Washington
- Yeshiva of Greater Washington

COLLEGE CAMPUSES AND HILLELS

- American University
- College of William and Mary
- Gallaudet University
- George Mason University
- George Washington University
- Georgetown University
- James Madison University
- University of Maryland
- University of Mary Washington
- University of Virginia
- Virginia Tech

LOCAL YOUTH GROUPS

- BBYO
- Bnei Akiva
- Habonim Dror
- National Conference of Synagogue Youth
- North American Federation of Temple Youth Mid-Atlantic Region
- United Synagogue Youth
- Tzofim

ISRAEL & OVERSEAS NETWORK

- American Jewish Joint Distribution Committee
- Jewish Agency for Israel
- World ORT

ISRAEL & OVERSEAS PROGRAMS

- Dror Yisrael
- Eretz Ir
- Israeli Council on Youth Movements
- Israel Gay Youth
- Israel Hofsheets
- Israel Religious Expressions Platform (iRep)
- Mahalach Fund
- Network of Community Centers in Beit Shemesh—Zinman Matnas
- Rimon School of Music
- Ruppin Academic Center
- Shahaf Foundation
- Shalva
- Shutaf Inclusion Camp
- Social Venture Fund for Jewish-Arab Equality and Shared Society
- Sunrise Day Camp
- Tarbut

NATIONAL AGENCIES

- 70 Faces Media
- Birthright Israel Foundation
- HIAS
- Hillel International
- Inter-Agency Task Force on Israeli Arab Issues
- Israel Action Network
- JCC Association
- Jewish Council for Public Affairs
- The Jewish Federations of North America
- Jewish War Veterans of the United States of America
- JPRO Network
- National Coalition Supporting Eurasian Jewry
- Network of Jewish Human Service Agencies

Bylaws of The Jewish Federation of Greater Washington

**BYLAWS
OF
THE JEWISH FEDERATION
OF GREATER WASHINGTON, INC.**

Dated: April 29, 2014

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BYLAWS
OF
THE JEWISH FEDERATION OF GREATER WASHINGTON, INC.

(a Maryland nonprofit corporation)

ARTICLE I

ORGANIZATION AND PURPOSES

Section 1. *Organization.* The Jewish Federation of Greater Washington, Inc. (the “Federation”) is organized under the laws of Maryland as a nonprofit corporation and shall be operated exclusively for charitable and educational purposes within the meaning of Section 170(c)(2) and Section 501(c)(3) of the Internal Revenue Service Code of 1986, as amended, or the corresponding provisions of any future United States internal revenue law (the “Internal Revenue Code”).

Section 2. *Purposes.* The purposes of the Federation are to build and sustain a purposeful and vibrant Jewish community in the Greater Washington, DC area, in Israel, and throughout the world, as expressed from time to time in the Mission Statement approved by the Federation’s Board of Directors (the “Board”).

Section 3. *Limitation on Authority.* Governance of the Federation is vested in the Board and the Executive Committee, each acting as a collective body in accordance with these Bylaws. The authority of the members of the Board and the Executive Committee to determine the policies and practices of the Federation is limited to actions taken in their roles as members of the Board and/or the Executive Committee.

ARTICLE II

OFFICES

Section 1. *Principal Office.* The principal office of the Federation shall be located in the State of Maryland at such place as the Board shall from time to time designate. The Federation may also maintain additional offices at such other places as the Board may from time to time designate.

Section 2. *Resident Office and Resident Agent.* The Federation shall have and continuously maintain in the State of Maryland a resident agent and a resident agent address, which need not be the same address as that of its principal office.

ARTICLE III

MEMBERSHIP OF THE FEDERATION

Section 1. *Members.* The membership of the Federation shall consist of individuals (“Members”) and agencies (“Member Agencies”) (together, the “Membership”).

Section 2. *Individual Members.* Every person, 18 years of age or older, who maintains a residence in the Greater Washington, DC area and who has made a commitment of at least eighteen dollars (\$18) to the most recently completed Campaign of the Federation or to the current Campaign shall be a Member of the Federation.

Section 3. *Member Agencies.* An agency or organization that is approved by the Board pursuant to consideration of such factors as it shall deem appropriate shall be a Member Agency.

ARTICLE IV

ANNUAL MEETING OF THE FEDERATION

Section 1. *Place.* An annual meeting of the membership of the Federation (the “Annual Meeting”) shall be held in the Greater Washington, DC area.

Section 2. *Time.* The time, date and place of the Annual Meeting shall be determined by the President. Notice thereof shall be published at least ten (10) days prior to the date of the Annual Meeting in a manner designed to provide reasonable notice to the Greater Washington, DC Jewish community.

Section 3. *Agenda.* The agenda for the Annual Meeting shall be determined by the President in advance of the Annual Meeting and shall include the following items of business:

- a. Election of At-Large Board Members;
- b. Election of an Honorary Board Member, if there is a nominee;
- c. Transaction of any other business stated in the notice; and
- d. Transaction of new business, if any.

Section 4. *Chairperson.* The President shall appoint the chairperson(s) of the Annual Meeting.

Section 5. *Quorum.* Fifty (50) Members of the Federation shall constitute a quorum at the Annual Meeting.

Section 6. *Voting.* Only Members shall be entitled to vote at the Annual Meeting. Each Member shall have one vote. Unless otherwise stated herein, the vote of a simple

majority of Members present is necessary for a motion to pass. Voting by proxy shall not be permitted.

ARTICLE V

BOARD OF DIRECTORS

Section 1. *Board Membership.* The membership of the Board shall consist of the following individuals:

- a. The members of the Executive Committee, the chairpersons of the committees described in ARTICLE X, and the President of the Greater Washington Jewish Community Foundation;
- b. One (1) person designated by each Member Agency, provided that such person is a Member of the Federation. In each case such person shall be, in order of preference, the President, the President-elect, a recent President or another officer of such Member Agency;
- c. Sixty (60) At-Large Board Members, preferably including at least five (5) rabbis who as a group represent as broad a range of Jewish movements as is feasible;
- d. Up to five (5) individuals appointed by the President (the “Presidential Board Members”). The foregoing shall not limit the authority of a President elected to fill a vacancy to make up to five (5) individual appointments in addition to any such appointments by her/his predecessor;
- e. All past presidents of the Federation; all past Campaign chairpersons; and
- f. Honorary Board Members.

Section 2. *Eligibility.*

- a. Members of the Federation whose financial accounts are not delinquent within the meaning of the Federation’s Policy on Collections shall be eligible to be members of the Board.
- b. Individuals who have demonstrated an enduring commitment to the Federation, have served as an officer and/or Board member for a combined minimum of 18 years, have worked on behalf of the Federation in campaigns, have provided significant service in other positions of responsibility, and in general continue to act as senior statespersons of the Greater Washington, DC Jewish community are eligible to be Honorary Board Members. Also individuals who have contributed uniquely outstanding leadership to the Greater Washington, DC Jewish community may be Honorary Board Members without regard to the foregoing criteria.

- c. All Board members shall accord priority to their fiduciary responsibility as Board members to the Federation and no member of the Board shall act as a representative or special advocate of any constituency or Member, and shall adhere to the Federation's Conflict of Interest Policy.

Section 3. *Term of Service.*

- a. The terms of the individuals listed in Section 1(a) hereof shall be for so long as the individuals hold the specified positions.
- b. The terms of all At-Large Board Members shall be three (3) years except that the terms of members elected to fill vacancies shall conclude at the end of the terms of the members replaced. After serving two (2) consecutive three-(3) year terms (not including a term resulting from election to fill a vacancy), an At-Large Board Member shall not be eligible for re-election as an At-Large Board Member for the ensuing year.
- c. The terms of Board members designated by Member Agencies shall be determined by each Member Agency.
- d. The terms of Presidential Board Members shall terminate at the end of the term of office of the appointing President (even if the President does not complete serving such term).
- e. The terms of past Presidents, past Campaign chairpersons and Honorary Board Members are for life.

Section 4. *Removal.* By the affirmative vote of a two-thirds majority of those present at a duly convened meeting, the Board may remove any Board member from the Board for cause, or because such Board Member is unable to serve, provided that no such action may be taken unless the Executive Committee has provided the Board with its written recommendation of such action at least ten (10) days prior to such Board meeting, and provided further that no Board member shall be removed without (i) at least thirty (30) days' prior written notice by the Executive Committee setting forth its intention to recommend such action to the Board and the reasons therefore, and (ii) a reasonable opportunity to be heard at such Board meeting. Absence without good cause from three (3) consecutive Board meetings shall be considered cause. Other circumstances constituting cause or inability to serve shall be as determined by the Board.

Section 5. *Compensation.* Board members (with the exception of the CEO) shall not receive compensation from the Federation for any services rendered in their capacity as Board members.

Section 6. *Regular and Special Board Meetings.*

- a. At the beginning of each fiscal year the President shall make and distribute a schedule of not fewer than five (5) regular Board meetings to be held that year.

- b. Special Board meetings may be called at any time by the President or at the written request of fifteen (15) Board members. At a special Board meeting, only the matters stated in the notice thereof shall be considered.
- c. Written notice of regular and special Board meetings shall be given at least ten (10) days before the meeting by the Secretary. A copy of the notice of meeting shall be distributed with the minutes of the meeting, and approval of the minutes at the next meeting of the Board shall be conclusive evidence of delivery of proper notice.
- d. If the President determines that there is an emergency or other circumstances that require formal Board deliberation sooner than would be permitted by the notice requirement of subsection c hereof, the President may waive that requirement, in which case notice may be provided at any time before such special meeting by any one or more reasonable means deemed by the President to be most effective in the circumstances. Only such matters as are relevant to the emergency or other circumstances requiring such waiver shall be considered.

Section 7. *Quorum.* Twenty-five (25) members of the Board shall constitute a quorum at all meetings of the Board.

Section 8. *Voting.* Unless otherwise stated herein, the affirmative vote of a majority of members present and voting shall be required for a motion to pass. Each member of the Board shall have one vote. Voting by proxy shall not be permitted.

Section 9. *Alternative Means of Participation.* The President may permit participation in a meeting of the Board by telephonic conference, communication over the Internet or other means of communication, provided that such form of communication (i) is generally available to members of the Board and (ii) permits the simultaneous voice participation of the members. Members participating in a meeting by such means shall be deemed to be present in person at such meeting.

ARTICLE VI

DUTIES AND AUTHORITY OF THE BOARD

Section 1. *Vision and Mission.* The Board shall be responsible for articulating the vision and mission of the Federation through the Federation's Mission Statement, as it may amend it from time to time, and in such other forms as the Board may deem appropriate.

Section 2. *Strategic Plan.* The Board shall from time to time approve a strategic plan for the accomplishment of the Federation's mission, and in furtherance thereof it shall be responsible for approving the annual priorities of the Federation, including the report of the Executive Committee on the fundraising goals for the Annual Campaign, and approving the

policies that are necessary or appropriate to establishing the Federations' objectives with respect to the foregoing.

Section 3. *Allocations.*

- a. Grants. The Board shall have the authority to approve all allocation recommendations of the Executive Committee and of the United Jewish Endowment Fund ("UJEF"), including recommendations for emergency allocations, except as provided in Section 2(g) of ARTICLE IX. The Board shall have the further authority to approve special allocations without the recommendation of the Executive Committee or the UJEF, as it may deem warranted by circumstances. The Board's failure to approve an allocation recommendation shall be deemed to be a referral of the recommendation back to the Executive Committee or to the UJEF for further consideration of such issues as the Board specifies; provided, however, that with respect to the annual allocation recommendation of the Executive Committee and a multiple-allocation recommendation of the UJEF the Board must approve it or refer it back as a whole. Each beneficiary of a Board-approved allocation shall have a legal right to the monies so allocated only to the extent that the allocated money has been disbursed to the beneficiary.
- b. Revocation. The Board shall have the authority to approve, either on its own motion or on the recommendation of the Executive Committee or the UJEF Trustees (as appropriate), that an allocation of funds previously approved by the Board, but not yet expended, be revoked and such funds not be disbursed.

Section 4. *Budget.* Upon the recommendation of the Executive Committee, the Board shall have the authority to either approve or reject the annual and capital budgets of the Federation, but its approval of nonmaterial amendments to such budgets by the Executive Committee shall not be required. The Executive Committee shall provide notice of any nonmaterial amendments to the Board prior to the next Board meeting following such action by the Executive Committee.

Section 5. *Member Agencies.* Upon the recommendation of the Executive Committee, the Board shall have the authority to approve the admission of an agency to Membership in the Federation.

Section 6. *Nominations Committee.* Pursuant to the procedures provided in Section 1 of ARTICLE XI, the Board shall have authority to elect the members of the Nominations Committee.

Section 7. *Election of Officers; Presidential Appointments to the Executive Committee.* Pursuant to the procedures provided in Section 3 of ARTICLE XI, the Board shall have the authority to elect the Officers of the Federation (with the exception of the CEO). The President's appointments to the Executive Committee shall be subject to approval by the Board.

Section 8. *Election of United Jewish Endowment Fund Trustees.* Pursuant to the procedures provided in Section 6 of ARTICLE XIII, the Board shall have the authority to elect the Trustees of the UJEF.

Section 9. *Chief Executive Officer.* Pursuant to the procedures provided in Section 2 of ARTICLE XII the Board shall have the authority to approve the Federation’s initial employment, extension of employment, or termination of the CEO.

Section 10. *Vacancies.* In the event of a vacancy among the Officers (except the CEO), the At-Large Board Members, and/or the Trustees of the UJEF, the Board shall have the authority to elect a Member to complete the term of any such member pursuant to the procedure specified in ARTICLES XI and XIII.

Section 11. *Annual Audit.* The Board shall have the final authority to accept the independent auditor’s annual report and recommendations with respect to the financial condition of the Federation after considering the views of the Executive Committee pursuant to Section 2(o) of Article IX and the recommendation of the Audit Committee pursuant to Section 1(j) of Article X.

Section 12. *Borrowing Money.* The Board shall have authority to borrow money in the name of the Federation and, in connection therewith, to mortgage the property of the Federation (or any part thereof) as security for such indebtedness. In furtherance of the foregoing authority, the Board shall have authority to expend or disburse any such borrowed money. The Board may authorize the proper Officer or Officers of the Federation to make, execute and deliver in the name and on behalf of the Federation such notes, bonds, and other evidence of indebtedness as the Board shall deem proper. No action on the part of the Membership shall be requisite to the validity of any such evidence of indebtedness.

Section 13. *Actions of the Executive Committee.* Except with respect to actions pursuant to authority expressly delegated to the Executive Committee hereunder, any action of the Executive Committee may be overridden by the Board as it deems appropriate.

Section 14. *Articles of Incorporation, etc.* Subject to the affirmative vote of two-thirds of the members of the Board, the Board shall have the authority to approve amendments to the Federation’s articles of incorporation, organic and structural changes to the organization of the Federation, and the dissolution and liquidation of the Federation.

ARTICLE VII

OFFICERS, TERMS OF OFFICE, AND REMOVAL

Section 1. *Officers.* The officers of the Federation (collectively, the “Officers” and each individual, an “Officer”) shall consist of a President, a Chief Executive Officer (“CEO”), up to two (2) Vice Presidents for Financial Resource Development (“FRD”) (also known as the Campaign Chairperson), two Vice Presidents, one for Community & Global Impact – Local (“CGI-Local”) and one for Community & Global Impact—Israel and Overseas (“CGI-I&O”), a Vice President for Women’s Philanthropy, a Vice President for Finance and

Treasurer, a Vice President for Leadership and Volunteer Development, a Vice President for Marketing, a Vice President for Young Leadership, a Vice President At-Large, and a Secretary. The CEO shall also be the Assistant Secretary.

Section 2. *Term of Office.* The full terms of the Officers (except the CEO) shall be approximately one (1) year commencing on the date of their election and ending on the earlier of (i) the date of the election of their successor and (ii) last day of the fiscal year immediately following their election or, if no successor has been elected at that time, when a successor shall be elected. The terms of Officers elected to fill vacancies shall conclude at the end of the terms of the Officers replaced. No Officer (except the CEO) shall be eligible to serve in the same office for more than two (2) consecutive full terms. Notwithstanding the foregoing, in the event the Special Nominations Committee shall recommend to the Nominations Committee that it is in the best interest of the Federation to re-elect a President who is then serving a second consecutive term, then the President shall be eligible to be nominated for one such additional term. In the event the President shall be so nominated, then the Nominations Committee may nominate some or all of the other Officers for the offices then occupied by such Officers for one additional term regardless of whether they would constitute third consecutive terms. This limit on consecutive terms shall not prevent the election of an Officer to any other office immediately following the Officer's second consecutive term in one office, nor shall it prevent the Officer's election to the same office for the fiscal year following a one (1) year absence from that office. Notwithstanding the foregoing, an Officer shall not be eligible to serve as an Officer for more than six (6) consecutive terms except that service as President and as Vice President for FRD shall be disregarded for this purpose.

Section 3. *Removal.* By the affirmative vote of a two-thirds majority of those present at a duly convened meeting, the Board may remove for cause or inability to serve any Officer from office or any member of the Executive Committee appointed by the President, provided that no such action may be taken unless the Executive Committee has provided the Board with its written recommendation of such action at least ten (10) days prior to the Board meeting, and provided further that no Officer or appointed member of the Executive Committee shall be removed without (i) at least thirty (30) days' prior written notice by the Executive Committee setting forth its intention to recommend such action to the Board and the reasons therefore, and (ii) reasonable opportunity to be heard at such Board meeting. Circumstances constituting cause or inability to serve shall be as determined by the Board.

ARTICLE VIII

DUTIES OF OFFICERS

Section 1. *President.* The President shall have the powers necessary and appropriate to carry out the duties of the office.

- a. The President's duties include responsibility for setting the agenda for and presiding at the Annual Meeting and at all meetings of the Board and the Executive Committee, promoting the transparency of the Federation's processes and policies, appointing committee chairs not otherwise specified in Section 2 hereof and appointing people to fill other lay

positions, authorizing review from time to time of compliance with the Federation's Conflict of Interest Policy, serving as a member of the Executive Evaluation and Compensation Committee and the Special Nominations Committee and an ex-officio member of all standing committees except the Nominations Committee and the Audit Committee, and appointing members to the Board and the Executive Committee as provided for herein.

- b. The President's duties include negotiating the terms and conditions of the CEO's employment contract and any material extension or modification thereof and, subject to Section 9 of Article VI and Section 2(m) of Article IX, execution of such employment contract.
- c. The President, as lay leader of the Federation, and the CEO, as head of the Federation's professional staff, shall work jointly and in a collegial manner, coordinating their activities, as appropriate, to address and implement the policies adopted and actions taken by the Executive Committee.
- d. The President and the CEO have joint responsibility for speaking on behalf of the Federation and in the Federation's dealings with the Greater Washington, DC Jewish community generally and in all public forums. In discharging this joint responsibility, the President and the CEO shall coordinate with each other so that they speak for the Federation as a "single voice." The President and the CEO shall designate others to speak on behalf of the Federation as each may determine to be desirable.
- e. The President shall also have such other responsibilities as provided herein and as may be determined by the Board or the Executive Committee from time to time.

Section 2. *Vice Presidents.* The following Vice President shall perform the functions specified herein.

- a. Vice President for FRD. The Vice President for FRD shall be chair of the Campaign Cabinet. This office may be shared by more than one Member.
- b. Vice President for Community & Global Impact – Local. The Vice President for CGI-Local, together with the Vice President for CGI-I&O, shall jointly chair the Community & Global Impact Committee.
- c. Vice President for Community & Global Impact – Israel and Overseas. The Vice President for CGI-I&O, together with the Vice President for CGI-Local, shall jointly chair the Community & Global Impact Committee.

- d. Vice President for Women's Philanthropy. The Vice President for Women's Philanthropy shall be chair of the Women's Philanthropy Committee.
- e. Vice President for Leadership and Volunteer Development. The Vice President for Leadership and Volunteer Development shall be chair of the Leadership and Volunteer Development Committee.
- f. Vice President for Marketing. The Vice President for Marketing shall be chair of the Marketing Committee.
- g. Vice President for Young Leadership. The Vice President for Young Leadership, possibly with another senior lay volunteer of Young Leadership (who shall not be a member of the Executive Committee), shall work with the Federation's Director of Young Leadership to organize and lead the Federation's Young Leadership activities.
- h. Vice President At-Large. The Vice President At-Large shall perform such duties as the President or the Executive Committee may determine from time to time.
- i. Vice President for Finance and Treasurer. The Vice President for Finance and Treasurer shall be chair of the Finance Committee.
- j. Chief Executive Officer. The CEO shall have the duties and responsibilities specified in ARTICLE XII and in her/his contract of employment.

Section 3. *Secretary.* The Secretary shall provide notice of Board meetings in accordance with Section 6(c) of ARTICLE V, prepare minutes of all Board and Executive Committee meetings, determine the presence of a quorum at such meetings, determine the eligibility to vote of those present at such meetings, provide the Board with timely notice of all operational policies adopted by the Executive Committee, and perform such additional duties as the President or the Executive Committee may determine from time to time.

Section 4. *Assistant Secretary.* In case of the Secretary's absence, resignation or inability to perform the duties of the Secretary, the Assistant Secretary shall perform the duties of the Secretary until the Secretary's return or recovery or until a successor is elected by the Board.

Section 5. *President Pro Tempore.* In the event of the President's absence or inability to perform the duties of President, the Vice President for FRD and, if the person holding such position is unavailable, the Vice President for CGI-Local shall serve as President Pro Tempore. The President Pro Tempore shall perform the duties of the President until the President returns or recovers or until a successor is elected by the Board, at which time the designation of President Pro Tempore shall end. In the event both the Vice President for FRD and the Vice President CGI-Local are unable or unwilling to serve, the Executive Committee shall designate another Vice President to be the President Pro Tempore.

ARTICLE IX

EXECUTIVE COMMITTEE

Section 1. *Members.* The Executive Committee shall consist of the following individuals: The Officers, the two (2) most recent past Presidents who are able to serve, the President of the UJEF, and two (2) members of the Board appointed by the President and confirmed by the Board. The term of each member appointed by the President shall conclude at the earlier of the following events: (i) the conclusion of the term of the President who appointed such member and (ii) the President leaving office. In the event the office of Vice President for FRD is shared by more than one Member, all such Members shall be members of the Executive Committee. All members of the Executive Committee shall act in furtherance of the goals established by the Board, and no member shall act as a representative or special advocate of any constituency or Member.

Section 2. *Duties and Authority.* The Executive Committee shall be responsible for developing and recommending to the Board policies to further the Federation's vision and mission as determined by the Board pursuant to Section 1 of ARTICLE VI, it shall oversee, monitor and coordinate the affairs of the Federation in furtherance of the goals, policies and priorities established by the Board, and it shall be responsible for the day-to-day lay management. In fulfilling these duties, the Executive Committee shall perform the following (without limitation as to the generality of the foregoing):

- a. Recommending the strategic plan of the Federation for approval by the Board as provided in Section 2 of ARTICLE VI;
- b. Recommending annual priorities and policies with respect thereto for approval by the Board as provided in Section 2 of ARTICLE VI;
- c. Determining the fundraising campaign time frames and campaign goals for the Annual Campaign and providing reports to the Board of such fundraising campaigns and campaign goals;
- d. Developing charitable campaigns to address natural catastrophes and other emergencies (including the establishment of lock box facilities);
- e. Developing and adopting policies and plans for the implementation of Federation fundraising campaigns and overseeing, monitoring and coordinating the campaign-related activities;
- f. Developing operating plans for and exercising day-to-day oversight, monitoring and coordination of the activities of Members other than the professional staff.
- g. Recommending annual operating budgets and capital budgets for approval by the Board as provided in Section 4 of ARTICLE VI;

- h. Recommending the allocation of funds for approval by the Board as provided in Section 3(a) of ARTICLE VI, except that the Executive Committee shall have the authority to approve allocations of not more than \$100,000 for each occasion on which it determines that circumstances warrant final action before such time as the Board is scheduled to meet next, which action shall be reported to the Board at its next meeting.
- i. If, and when necessary, recommending for approval by the Board as provided in Section 3(b) of ARTICLE VI that an allocation of funds previously approved by the Board, but not yet expended, be revoked and such funds not be disbursed;
- j. Recommending the admission of agencies to Membership for approval by the Board as provided in Section 5 of ARTICLE VI;
- k. Recommending candidates for election to the Nominations Committee by the Board as provided in Section 6 of ARTICLE VI;
- l. Appointing an attorney to serve as Counsel to the Federation;
- m. Considering and recommending to the Board the employment, the extension of employment or the termination of the employment of the CEO, and approving the employment contract and the annual compensation of the CEO, in accordance with the procedures provided in Sections 2 and 3 of ARTICLE XII and Section 1(g) of ARTICLE X;
- n. Retaining an independent auditor to report annually upon the financial condition of the Federation; and
- o. Considering the reports and recommendations of the Audit Committee and the annual report and recommendations of the independent auditor and making such recommendations with respect thereto to the Board as it deems appropriate.

Section 3. *Reserved Matters.* Other than when the Board is meeting, all powers of the Board are vested exclusively in the Executive Committee, except that the following matters are reserved to the Board and may not be delegated to or exercised by the Executive Committee:

- a. Adoption of the Federation's Mission Statement;
- b. Approval of the strategic plan of the Federation;
- c. Approval of the annual and capital budgets;
- d. Approval of the allocation of funds except as provided in Section 2(h) hereof;

- e. Approval of amendments to the Federation's articles of incorporation and any organic or structural changes, and dissolution of the Federation;
- f. Approval of the admission of agencies to Membership;
- g. Acceptance of the independent auditor's annual report and recommendations with respect to the financial condition of the Federation;
- h. The election of Officers, members of the Nominations Committee, and Trustees of the UJEF;
- i. Approval of the employment, extension of employment, or termination of the CEO; and
- j. Approval of all amendments to these Bylaws.

Section 4. *Removal.* By the affirmative vote of a two-thirds majority of those present at a duly convened meeting, the Executive Committee may remove for cause or inability to serve any member who is an Officer or a presidential appointee, provided that no such action may be taken unless the Executive Committee has provided such member (i) at least thirty (30) days' prior written notice setting forth its intention to take such action and the reasons therefore, and (ii) reasonable opportunity to be heard at the meeting at which the Executive Committee plans to take such action. Circumstances constituting cause or inability to serve shall be as determined by the Executive Committee.

Section 5. *Regular and Special Meetings.*

- a. At the beginning of each fiscal year the President shall make and distribute a schedule of not fewer than ten (10) regular Executive Committee meetings.
- b. Special meetings may be called at any time by the President or by the written request of five (5) Executive Committee members. At a special meeting, only the matters stated in the notice thereof shall be considered.
- c. Written notice of regular and special meetings shall be given at least five (5) days before the meeting. A copy of the notice of meeting shall be distributed with the minutes of the meeting, and approval of the minutes at the next meeting of the Board shall be conclusive evidence of delivery of proper notice.
- d. If the President determines that there is an emergency or other circumstances that require formal Executive Committee deliberation sooner than would be permitted by the notice requirement of subsection c hereof, the President may waive that requirement, in which case reasonable notice may be provided at any time before such special meeting by any means deemed by the President to be most effective in the

circumstances. Only such matters as are relevant to the emergency or other circumstances requiring such waiver shall be considered.

Section 6. *Quorum.* Nine (9) members of the Executive Committee shall constitute a quorum at any meeting of the Executive Committee.

Section 7. *Voting.* Unless otherwise stated herein, the affirmative vote of a majority of members present at a duly convened meeting and voting shall be required for a motion to pass. Each member of the Executive Committee shall have one vote. Voting by proxy shall not be permitted.

Section 8. *Alternative Means of Participation.* The President may permit participation in a meeting of the Executive Committee by telephonic conference, communication over the Internet or other means of communication, provided that such form of communication (i) is generally available to members of the Executive Committee and (ii) permits the simultaneous voice participation of the members. Members participating in a meeting by such means shall be deemed to be present in person at such meeting.

Section 9. *Action By Consent.* Any action required or permitted to be taken at a duly convened meeting of the Executive Committee may be taken without a meeting by the unanimous written consent of the Executive Committee evidenced by the signed and dated written consent of each member of the Executive Committee filed with the minutes of proceedings of the Executive Committee; provided, however, that such unanimous written consent shall not be valid if, after first requesting the consent of the Executive Committee members but prior to obtaining the consent of all members, a regularly scheduled meeting of the Executive Committee is convened. Written consent shall include e-mail messages and signed consent sent by facsimile.

ARTICLE X

STANDING AND PRESIDENTIAL COMMITTEES

Section 1. *Standing Committees.* Standing committees specified in this Section, are the permanent committees of the Federation. Except with respect to committees chaired by specified Officers and as otherwise provided herein or in Section 2 of ARTICLE VIII, the President shall appoint the chairperson of each standing committee. The chairperson of each standing committee shall, subject to the agreement of the President, appoint and remove members of the committee (who shall all be Federation Members) and create such sub-committees, divisions, task forces and working groups as the chairperson may deem to be necessary to carry out the responsibilities of the committee. Upon the recommendation of the Executive Committee, the Board may from time-to-time alter the composition of the standing committees and these Bylaws shall be revised to reflect such change when convenient.

- a. Campaign Cabinet. The Vice President for FRD shall be the chairperson of the Campaign Cabinet. The responsibilities of the Campaign Cabinet shall be to oversee, monitor and coordinate all campaign efforts in furtherance of the fundraising goals established by the Executive

Committee, to make recommendations to the Executive Committee with respect to the goals, priorities and policies for the campaigns, and to develop plans for the implementation thereof.

- b. Community & Global Impact Committee. The Vice Presidents for CGI-Local and CGI-I&O shall jointly be the chairpersons of the Community & Global Impact Committee. The responsibilities of the Community & Global Impact Committee shall be to:
 - i. Enhance the role of communal planning by deepening relationships, prioritizing needs, and developing strategies with partner agencies, congregations, and others to respond to significant communal issues locally, in Israel and in Jewish communities around the world;
 - ii. Oversee, monitor and coordinate local, Israel and overseas activities undertaken on behalf of the Federation; and
 - iii. Make recommendations to the Executive Committee with respect to the annual allocation of funds locally, in Israel and in Jewish communities around the world.
- c. Women's Philanthropy Committee. The Vice President for Women's Philanthropy shall be the chairwoman of the Women's Philanthropy Committee. The responsibilities of the Women's Philanthropy Committee shall be to oversee, monitor and coordinate activities specifically undertaken to facilitate the development and growth of women's philanthropy in furtherance of the goals established by the Board and to recommend to the Executive Committee goals, priorities and policies with respect thereto and to consult with the other committees with respect to the coordination of their respective responsibilities.
- d. Leadership and Volunteer Development Committee. The Vice President for Leadership and Volunteer Development shall be the chairperson of the Leadership and Volunteer Development Committee. The responsibilities of the Leadership and Volunteer Development Committee shall be to develop lay leaders who potentially may serve on the Board and the Executive Committee and more generally to oversee, monitor and coordinate activities specifically undertaken to facilitate the development, growth and participation of lay leaders and volunteers in furtherance of Federation activities.
- e. Finance Committee. The Vice President for Finance and Treasurer shall be the chairperson of the Finance Committee. The responsibilities of the Finance Committee shall be to:

- i. Review and monitor the finances of the Federation in furtherance of the goals established by the Board and make recommendations to the Executive Committee with respect thereto
 - ii. Review and oversee the internal financial operations of the Federation and to review and recommend to the Executive Committee the annual internal budget; and
 - iii. Oversee, monitor and coordinate the Federation's collections process, recommend to the Executive Committee policies with respect to pledge redemption, and recommend write-offs of pledges to the Executive Committee. In addition, the Finance Committee shall advise the Nominations Committee of the noncompliance with the Federation's Policy on Collections by any potential candidate for membership on the Board or for election as an Officer.
- f. Marketing Committee. The Vice President for Marketing shall be the chairperson of the Marketing Committee. The responsibilities of the Marketing Committee shall be to identify and implement the marketing activities to be undertaken by the Federation and to recommend policies, goals and priorities to the Executive Committee to facilitate the effective communication of the Federation's Mission Statement and goals to the community at large, to oversee, monitor and coordinate activities relative thereto, and to consult with the other committees as to the coordination of their respective responsibilities.
- g. Executive Evaluation & Compensation Committee. The immediate past President shall be the chairperson of the Executive Evaluation and Compensation Committee, and its members shall be the President, the immediate past President, and the Vice President for Finance and Treasurer. The responsibilities of the Executive Evaluation & Compensation Committee shall be to (i) review annually the performance and, subject to the terms of the CEO's employment contract, compensation of the CEO, and (ii) submit an annual performance evaluation and compensation recommendation to the Executive Committee with respect to her/his compensation. In its consideration of the appropriate terms for the compensation of the CEO, the Executive Compensation Committee shall ascertain that the proposed compensation is reasonable by reference to appropriate compensation data for similarly situated individuals and shall consult with counsel concerning the adequacy of the documentation that was the basis for such conclusion. Based upon the determinations of the Executive Committee, it shall be the responsibility of the Executive Evaluation & Compensation Committee to meet with the CEO to present the conclusions of the performance evaluation as approved by the Executive Committee and to inform the CEO of the Executive Committee's determination of compensation. The

Executive Evaluation and Compensation Committee shall also consult with the CEO on the compensation of the Federation's professional executive staff, and approve such compensation, to the extent necessary to comply with any "safe harbor" requirements of the Internal Revenue Code and implementing regulations.

- h. Nominations Committee. The Nominations Committee shall be constituted as provided in ARTICLE XI and shall carry out its responsibilities as set forth therein.
- i. Special Nominations Committee. The Special Nominations Committee shall be constituted as provided in ARTICLE XI and shall carry out its responsibilities as set forth therein.
- j. Audit Committee. The President shall appoint three (3) Members who have meaningful professional experience in the accounting profession to constitute the Audit Committee, only one (1) of whom may be a member of the Executive Committee and none of whom shall be the President, the Vice President for Finance and Treasurer, or the CEO. The responsibilities of the Audit Committee shall be to review the internal financial operations of the Federation, including without limitation reviewing the integrity of the financial statements and internal controls of the Federation, meeting with the Federation's independent auditors in order to consider their report and recommendations with respect to the financial condition and operations of the Federation (and report thereon to the Executive Committee), and recommending to the Board the acceptance of the independent auditors' annual report and recommendations with respect to the financial condition of the Federation. The Audit Committee shall also consider such matters and take such actions as are appropriate for the Audit Committee in accordance with the Conflict of Interest Policy of the Federation as in effect from time to time. The Audit Committee shall consult with others, including counsel, with respect to issues before it as it deems appropriate in the circumstances.

Section 2. *Presidential Committees*. The President may establish committees (each a "Presidential Committee") for such purposes as the President may determine to be necessary or appropriate, including (without limitation as to the generality of the foregoing) special and/or emergency campaign committees. The President shall appoint the chairperson and the members of each such Presidential Committee, all of whom shall serve at the pleasure of the President. The Presidential Committees shall be dissolved at such time as the President determines, provided that no Presidential Committee shall continue beyond the time that the appointing President's term of office ends (or would end but for the President not completing her/his term). The President shall report to the Executive Committee on the establishment and dissolution of a Presidential Committee.

Section 3. *Committee Members' Terms*. The term of each member of a standing committee shall end no later than the end of the fiscal year in which the committee

member is appointed. The term of each member of a Presidential Committee shall end at the time that the President determines, provided that no such term shall continue beyond the time that the appointing President's term of office ends (or would end but for the President not completing her/his term).

Section 4. *Eligibility.* Only a Member whose financial accounts are not delinquent within the meaning of the Federation's Policy on Collections may be a member of a committee of the Federation.

ARTICLE XI

NOMINATIONS OF OFFICERS AND BOARD MEMBERS

Section 1. *Committees.*

- a. Nominations Committee. The Nominations Committee shall consist of fifteen (15) members, shall include the Vice President for Leadership and Volunteer Development, and shall represent a diverse and representative sample of the Greater Washington, DC Jewish community. No later than February of each fiscal year, the President, with the approval of the Executive Committee, shall submit to the Board a list of recommended candidates to the Board for election as members of the Nominations Committee. The President shall appoint a chairperson from among the members of the Nominations Committee.
- b. Special Nominations Committee. The Special Nominations Committee shall consist of the President, the current Vice President for FRD, the most immediate past Vice President for FRD, and the eight (8) individuals who most immediately served as President; in the event there are multiple current or immediate past Vice Presidents for FRD, the President shall select one from each cohort. In addition, the President may (but is not required to) appoint an additional person to the Special Nominations Committee from among the past Vice Presidents for FRD not serving on the Special Nominations Committee. The responsibility of the Special Nominations Committee shall be to recommend to the Nominations Committee candidates for nomination to be elected President and Vice President for FRD; provided, however, that any member of the Special Nominations Committee who is a candidate for either of such offices shall withdraw from, and not participate in, the proceedings for and in respect of the nomination of the candidate for that office.

Section 2. *Special Nominations Procedures.* No later than ten (10) days before the first meeting of the Nominations Committee, the Special Nominations Committee shall submit, in writing, to the Nominations Committee a recommendation of candidates for nomination to be elected President and Vice President for FRD. The Nominations Committee shall promptly review the recommendation and shall, in its sole discretion, be entitled either to accept or reject the recommendation in whole or in part. If such recommendations are rejected in

whole or in part, the Nominations Committee shall notify the Special Nominations Committee, which shall then promptly submit the name of an alternate candidate for nomination to be elected President and/or Vice President for FRD. If the Special Nominations Committee (i) initially fails to submit recommended candidates for one or both positions as required herein, or (ii) fails to respond to the Nominations Committee's rejection of a recommended candidate in a timely manner, or if the Nominations Committee chooses not to accept the alternative recommendations of the Special Nominations Committee, the Nominations Committee shall select a nominee for each such position to recommend to the Board.

Section 3. *Nominations Committee Duties.*

- a. Officers. The Nominations Committee shall, taking into account recommendations from the Special Nominations Committee, recommend to the Board full-term and/or interim-term (as appropriate) nominees for Officers of the Federation in a written report which shall be signed by the chairperson of the Nominations Committee on its behalf and presented in writing to the Secretary at least thirty (30) days before the date set for the election of any such Officer.
- b. At-Large Board Members. The Nominations Committee shall recommend to the Federation Membership full-term and/or interim-term (as appropriate) nominees for At-Large Board Members in a written report which shall be signed by the chairperson of the Nominations Committee on its behalf and presented in writing to the Secretary at least thirty (30) days before the date set for the election of any such At-Large Board Member. As to full-term nominees to be elected at the Annual Meeting, the Secretary, upon receipt of the report of the Nominations Committee, shall cause the report to be published in a manner designed to provide reasonable notice to the Greater Washington, DC Jewish community.
- c. Honorary Board Members. The Nominating Committee may, but is not required to, nominate one (1) person each year to be elected an Honorary Board Member in accordance with the provisions of Section 2(b) of ARTICLE V. The Nominations Committee shall submit to the Secretary at least thirty (30) days before the date of the Annual Meeting its written recommendation, if any, of a candidate for election as an Honorary Board Member.
- d. Any member of the Nominations Committee who is a candidate for any office or position to be considered by the Nominations Committee shall withdraw from, and not participate in, the proceedings for and in respect of the nomination of the candidate for that office or position.

Section 4. *Nomination by Petition.* By written petition signed by two hundred (200) Members and submitted to the Secretary not fewer than fifteen (15) days prior to the date set for the Annual Meeting, Members may nominate additional candidates for election as At-Large Board Members. Any such further nominations submitted to the Secretary shall be

communicated to the Membership at the Annual Meeting immediately prior to any vote. No nominations from the floor shall be permitted at the Annual Meeting.

Section 5. *Quorum.* Eight (8) members of the Nominations Committee shall constitute a quorum at all meetings of the committee.

Section 6. *Voting.* The affirmative vote of a majority of members present at a duly convened meeting of the Nominations Committee shall be required for a motion to pass. Each member of the Nominations Committee shall have one vote. Voting by proxy shall not be permitted.

ARTICLE XII

CHIEF EXECUTIVE OFFICER

Section 1. *Duties.* The CEO shall implement the policies and plans adopted by the Board and the operating policies, plans and campaign goals adopted by the Executive Committee, and in doing so shall determine the operational details thereof and manage and direct the activities of the professional staff. The CEO shall meet with and engage a broad cross-section of the Greater Washington, DC Jewish Community so as to facilitate and better enable her/his fundraising efforts. The CEO shall also facilitate the flow of information between the professional staff and volunteers in order to promote efficiency and cooperation, provide resources and logistical support for the undertakings of the Board and the Executive Committee, provide the Board and the Executive Committee in a timely fashion with information relevant to their responsibilities, and perform such other duties specified in her/his employment contract. The CEO shall have authority to hire and dismiss staff members and to determine their compensation consistent with the internal budget, and shall be responsible for the conduct of, and have the authority to perform directly or by delegation without need of further authorization, all of the routine day-to-day tasks required for the ongoing operation of the affairs of the Federation. The CEO shall communicate with Member Agencies and the Greater Washington, DC Jewish community in a manner and with respect to matters for which it is ordinary and customary for a CEO to address. The CEO shall be an ex-officio member of all standing committees except the Executive Evaluation and Compensation Committee and the Audit Committee.

Section 2. *Employment.* The terms of the CEO's employment shall be in accordance with these Bylaws and shall be set forth in an employment contract between the Federation and the CEO. The employment, extension of the employment and the termination of the employment of the CEO, and any modification of the CEO's employment contract, shall be in accordance with the provisions of Section 9 of Article VI, Section 1 of Article VIII, Section 2(m) of Article IX and Section 1(g) of Article X, as applicable. In presenting any recommendation as to the proposed employment, the extension of employment or the termination of employment of the CEO to the Board for its approval, the President shall provide the Board with such information as the President believes reasonable in the circumstances with respect to the general basis for such recommendation.

Section 3. *Supervision and Performance Evaluation.* The President shall consult with the CEO as to the policies and plans for which the CEO has responsibility for day-

to-day implementation by the professional staff. Pursuant to Section 1(g) of ARTICLE X, the Executive Evaluation and Compensation Committee shall be responsible for evaluating the performance of the CEO. In furtherance of this responsibility, the Executive Evaluation and Compensation Committee shall, in consultation with members of the Executive Committee and such other people as it deems appropriate, review annually the CEO's performance, prepare a written performance evaluation to be provided to the CEO and the Executive Committee, and meet with the CEO to present its conclusions and recommendations. It is contemplated that this will be a collaborative process in which the committee and the CEO will determine mutually agreed performance goals at the outset of each year, and the CEO will have opportunity to comment on and respond to a draft of the committee's written evaluation prior to submission of the final evaluation report to the Executive Committee. Based on the foregoing performance evaluation, and subject to the CEO's employment contract, changes may be made with respect to the CEO's compensation for the next fiscal year as are in accordance with the procedures of these Bylaws.

ARTICLE XIII

UNITED JEWISH ENDOWMENT FUND

Section 1. *Authorization.* The United Jewish Endowment Fund (the "UJEF") is a division of the Federation established for the purposes stated herein and operated in accordance with the procedures stated herein.

Section 2. *Purposes.* The UJEF shall create and maintain a permanent endowment to:

- a. Serve as a means by which members of the Jewish community can fulfill their charitable interests in addition to their participation in the Annual Campaign;
- b. Improve the quality of Jewish communal life by providing seed money for new and innovative programs, research study projects and other activities which cannot be embraced by the regular budget of the Federation or its Member Agencies;
- c. Serve as a reserve fund to meet emergency needs in the Greater Washington, DC Jewish community or Jewish communities elsewhere;
- d. Provide a method by which donors can perpetuate their support for the Federation generally, and for specified religious, charitable or educational institutions in particular;
- e. Support the Federation in becoming a unifying force within the Greater Washington, DC Jewish community; and
- f. Serve such other special purposes of the Federation as the Board may determine, including (without limitation as to the generality of the

foregoing) support of religious, charitable, philanthropic, scientific and educational organizations and institutions.

Section 3. *Trustees and Advisors.* The UJEF shall have a Board of Trustees (the “Trustees”) who are responsible for establishing the UJEF’s policies, implementing the UJEF’s duties specified in subsection 5 hereof and otherwise managing the UJEF.

- a. Voting Trustees. There shall be no fewer than 25 nor more than 29 voting Trustees of the UJEF consisting of the following individuals:
 - i. The President of the Federation;
 - ii. The President of the UJEF;
 - iii. 21-25 Trustees elected by the Federation Board (the “Elected Trustees”);
 - iv. If the immediate past UJEF President is not an Elected Trustee, then, immediately following her/his term as UJEF President, she/he shall serve a one-year term as one of the no more than 29 voting Trustees; and
 - v. Two Trustees appointed by the President of the UJEF (the “Appointed Trustees”).
- b. Nonvoting Trustees. The nonvoting Trustees of the UJEF shall be:
 - i. The CEO; and
 - ii. Any Trustees Emeriti.
- c. Advisors. The Advisors to the Trustees shall be the Vice Presidents for CGI-Local and CGI-I&O. The Advisors shall not be entitled to vote.

Section 4. *Eligibility.*

- a. Voting Trustees must be Members.
- b. The President of the UJEF must be, at the time of appointment, a current or former Trustee of the UJEF.
- c. Trustees Emeriti shall be individuals who have rendered past service as a UJEF Trustee or other extraordinary service to the UJEF, the Federation and the community.

Section 5. *Duties.* The UJEF shall obtain and manage funds and real and personal property for endowment and other special purposes of the Federation, including support of such religious, charitable, philanthropic, scientific or educational organizations and institutions as may be designated by the Federation Board. For such purposes and subject to the

scope of the powers granted to the Federation in its Articles of Incorporation, the Trustees shall have full discretion and authority to:

- a. Solicit, receive and acquire funds and real and personal property, hold such funds and property in the name of the Federation or nominees, and direct the management, investment, reinvestment, or disposition thereof;
- b. Employ and compensate investment counsel, real estate managers, attorneys, and such other persons and organizations as may be required in connection with the operation of the UJEF;
- c. Enter into agreements with donors subject to such terms and conditions as may be required to carry out the charitable intentions of the parties;
- d. Recommend grants for approval by the Federation Board and approve grants from the UJEF's Philanthropic Funds;
- e. Distribute approved grants and, if and when necessary, revoke or recommend to the Federation Board in accordance with Section 3(b) of ARTICLE VI (as appropriate) an allocation of funds previously approved by the Trustees or the Federation Board (as applicable), but not yet expended, be revoked and such funds not be disbursed;
- f. Submit to the Federation Board the names of nominees for election as Trustees of the UJEF; and
- g. Perform such other acts as may be required for the proper administration of the UJEF, including the establishment of operating procedures.

Section 6. *Election of Trustees.*

- a. Voting Trustees. At least 15 days prior to the last regular meeting of the Federation Board in a fiscal year, the voting Trustees shall nominate a slate of candidates to be elected as Elected Trustees, provided that the number of nominees shall be sufficient to satisfy the minimum and maximum number of Elected Trustees specified in Section 3(a)(iii) hereof. The Secretary shall provide the Federation Board with notice of the names of the nominees not fewer than ten (10) days before the meeting. At that meeting, the Federation Board shall vote on the slate of nominees as a group. If the Federation Board does not elect the slate of nominees, the Trustees shall recommend a new slate of nominees for election at the next meeting of the Federation Board.
- b. Trustees Emeriti. The voting Trustees shall nominate and elect Trustees Emeriti in accordance with criteria and procedures to be determined by the Trustees from time to time.

Section 7. *Length and Term of Service.*

- a. Elected Trustees. The term of office for any Elected Trustee shall be three (3) years. The term of office for Elected Trustees elected at the last regular meeting of the Federation Board in a fiscal year shall begin at the beginning of the next fiscal year and conclude at the end of the third fiscal year following their election. The term of office of Trustees elected at other times shall begin at the time of their election and conclude at the end of the second ensuing full fiscal year or, in the case of a Trustee elected to fill a vacancy, at the conclusion of the term of the replaced Trustee. Elected Trustees may serve a maximum of two (2) consecutive full terms (which shall include any term beginning after the start of the fiscal year on account of the Board's failure to elect the slate of nominees at its last regular meeting of the fiscal year). The limit on service shall not include partial terms except that in no event shall any Trustee, other than the President of the UJEF, serve as a Trustee for more than eight (8) consecutive years. A Trustee who has served two (2) consecutive terms can, after at least one (1) year as a non-Trustee, be considered anew for election as a Trustee.
- b. President of the UJEF. The term of office for the President of the UJEF shall conclude at the end of the fiscal year for which she/he is appointed. The President of the UJEF may serve consecutive terms.
- c. Appointed Trustees. The term of office for an Appointed Trustee shall conclude at the end of the fiscal year in which she/he is appointed. An Appointed Trustee may serve consecutive terms.
- d. Immediate Past President of the UJEF who is not an Elected Trustee. The term of office for an immediate Past President who is not an Elected Trustee shall conclude at the end of the fiscal year in which she/he is appointed.
- e. Trustees Emeriti. The term of office of a Trustee Emeritus shall be for life.

Section 8. *Officers.* The UJEF shall have the following officers:

- a. President. A President to be appointed by the President of the Federation.
- b. Secretary. The UJEF President may appoint a Secretary from among the Trustees who shall serve in place of the UJEF President in the event the UJEF President shall be absent or unable to serve, subject to the approval of the President of the Federation.
- c. Other Officers. The voting Trustees may elect such other officers with such duties as they determine from time to time.

- d. Managing Director. A Managing Director.

Section 9. *Managing Director.*

- a. Responsibilities. The Managing Director shall be the chief professional officer of the UJEF.
- b. Hiring. The CEO shall hire the Managing Director after appropriate consultation in advance with the Trustees, as represented by the UJEF President and, if so desired by the UJEF President, additional representatives appointed by the UJEF President from among the Trustees (the “Appointed Representatives”). The UJEF President and Appointed Representatives shall have an opportunity to interview any prospective hire before an offer is extended.
- c. Supervision. Management, direction and overall supervision of the Managing Director, including job assignments, education, training, performance review and compensation, is the responsibility of the CEO or his/her designee. In performing these functions with respect to the Managing Director, the CEO will consult and coordinate (as appropriate) with the Trustees, as represented by the UJEF President and Appointed Representatives.
- d. Termination. The CEO may terminate the Managing Director after appropriate consultation in advance with the Trustees, as represented by the UJEF President and the Appointed Representatives.

Section 10. *Voting.* Elected Trustees, the Appointed Trustees, the President of the UJEF, and the President of the Federation shall be entitled to vote on matters coming before the Trustees, including but not limited to making recommendations to the Federation Board for grants (or revocation of grants) and approving distributions from Philanthropic (Donor Advised) Funds.

Section 11. *Vacancies.* If a vacancy occurs during the term of office of an Elected Trustee, the voting Trustees shall nominate a candidate for election to complete the unexpired term of the vacated office, and the Federation Board shall conduct an election with respect to such vacated office. If a vacancy occurs during the term of office of the President of the UJEF, the President of the Federation shall appoint a successor to complete the unexpired term of the vacated office. If a vacancy occurs during the term of office of an Appointed Trustee, the President of the UJEF shall appoint a successor to complete the unexpired term of the vacated office.

Section 12. *Approval of UJEF Grants.* With the exception of grants from Philanthropic (Donor Advised) Funds, the Trustees’ recommendations for grants from the UJEF shall become effective when approved by the Federation Board. The Trustees shall approve distributions from Philanthropic (Donor Advised) Funds without approval by the Federation Board, provided that the Trustees provide the Federation Board with a summary of distributions from Philanthropic (Donor Advised) Funds not less frequently than annually.

Section 13. *Modifications to the UJEF Structure.* Any action by the Federation Board to change the structure or organization of the UJEF shall not be taken without prior consultation with the Trustees.

Section 14. *Administration of the UJEF.* The voting Trustees shall propose, and from time to time amend, for approval by the Federation Board, operating procedures for the UJEF that are consistent with these Bylaws and other governing instruments or policies of the Federation, including (without limitation as to the generality of the foregoing) policies and procedures for operation of the Philanthropic (Donor Advised) Funds, other administrative rules and policies, routine procedural matters, the frequency of meetings, the required time and content of meeting notices, the number of Trustees required for a quorum, and permissible means of participation in meetings.

ARTICLE XIV

NOTICES

Section 1. *Form; Delivery.* Any notice required or permitted to be given to any Board member or Executive Committee member shall be given in writing, delivered by electronic mail (“e-mail”) over the Internet to the recipient’s e-mail address as it appears in the records of the Federation, unless such recipient has previously informed the Federation that he/she requires that all notices be delivered personally, by first-class mail or by other delivery service, or transmitted by facsimile. Notices delivered by e-mail shall be deemed given when sent to the recipient (unless the Federation has received notice that the e-mail was not delivered to the intended recipient’s mailbox); notices provided personally or by delivery service shall be deemed to be given at the time they are delivered at the address of the named recipient; mailed notices shall be deemed to be given at the time they are deposited in the United States mail; and other electronically transmitted notices (facsimile) shall be deemed to be given at the time such transmissions are confirmed.

Section 2. *Waiver of Notice.* Any notice required by law, the articles of incorporation or these Bylaws, may be waived before or after the specified time by written statement, signed by the person entitled to such notice. Participation in a meeting by a person other than for the purpose of protesting that the meeting was improperly noticed shall be deemed to be a waiver of notice of that meeting by that person.

ARTICLE XV

INDEMNIFICATION AND EXCULPATION

Reference is hereby made to Section 2-418 of the General Corporation Law of the State of Maryland (or any successor provision thereto). The Federation shall indemnify each person who may be indemnified (the “Indemnitees”) pursuant to such section to the full extent permitted thereby. In each and every situation where the Federation may do so under such section, the Federation hereby obligates itself to so indemnify the Indemnitees, and in each case, if any, where the Federation must make certain investigations on a case-by-case basis prior to

indemnification, the Federation hereby obligates itself to pursue such investigation diligently, it being the specific intention of these Bylaws to obligate the Federation to indemnify each person whom it may indemnify to the fullest extent permitted by law from time to time. To the extent not prohibited by Section 2-418 of the General Corporation Law of the State of Maryland (or any other provision of the General Corporation Law of the State of Maryland), the Indemnitees shall not be liable to the Federation except for their own individual fraud, willful misconduct or actions taken in bad faith. Such indemnification shall not be deemed exclusive of any other rights to which such person may be entitled under these Bylaws, provision established by the Board, agreement with the Federation, and/or other source of indemnification.

ARTICLE XVI

EXECUTION OF CHECKS, INSTRUMENTS, ETC.

Section 1. *Payment of Money.* All checks, drafts and orders for the payment of money in excess of Ten Thousand Dollars (\$10,000) shall be signed in the name of the Federation by two people: one of which shall be the CEO or such other professional staff of the Federation as the CEO may have delegated her/his authority in a written notice specifying the terms of such delegation as the CEO deems appropriate in the circumstances, and the other of which shall be the President or the Vice President of Finance and Treasurer, and in the case of checks drawn on the account of the UJEF, the President or Secretary (if any) of the UJEF; in all cases the list of approved signors may be expanded to include such other Officers or agents as the Board or Executive Committee shall from time to time designate. The Executive Committee may approve operational procedures addressing the approval and execution of checks that are not inconsistent with the requirements specified herein.

Section 2. *Contracts and Other Instruments.* Upon the proper authorization of the execution of any contract, conveyance or other instrument (an “Agreement”), the same may be executed in the name and on behalf of the Federation by the CEO or such other professional staff of the Federation as the CEO may have delegated her/his authority in a written notice specifying the terms of such delegation as the CEO deems appropriate in the circumstances, provided, that if the Agreement is a Material Contract (as defined below) it shall also be signed by the President or the Vice President of Finance and Treasurer; in all cases the list of approved signors may be expanded to include such other Officers or agents as the Board or Executive Committee shall from time to time designate. The Executive Committee may approve operational procedures addressing the approval and execution of Agreements that are not inconsistent with the requirements specified herein. For the purpose of this provision, a “Material Contract” is an Agreement meeting any one of the following criteria: (a) an Agreement obligating the Federation to make payments or to incur obligations or liabilities in excess of One Hundred Thousand Dollars (\$100,000), (b) an Agreement for a term longer than one (1) year, or (c) an Agreement not in the ordinary course of business for the Federation.

ARTICLE XVII

FISCAL YEAR

The fiscal year shall be July 1 through June 30.

ARTICLE XVIII

AUDIT

There shall be an annual audit of the financial affairs of the Federation by a certified public accounting firm selected by the Audit Committee and approved by the Board.

ARTICLE XIX

DISSOLUTION

Pursuant to Section 13 of ARTICLE VI, the Board may approve the dissolution of the Federation. In the event of the dissolution of the Federation, the Board shall, after paying or making provisions for payment of all liabilities of the Federation, distribute all of its assets in furtherance of one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code or shall cause such assets to be distributed to the federal government, or to a state or local government, for a public purpose. Any of the assets not so distributed shall be distributed as determined by the appropriate Court in the jurisdiction in which the principal office of the Federation is then located.

ARTICLE XX

CONSTRUCTION

These Bylaws are to be construed and interpreted so as to further the purpose of the Federation and fulfill its Mission Statement.

ARTICLE XXI

AMENDMENTS; EFFECTIVE DATES

Section 1. *General.* These Bylaws may be amended, altered, changed, added to, or repealed at any meeting of the Board by the affirmative vote of a majority of all of the members of the Board.

Section 2. *Effective Date of Revised Bylaws.* Any revision of these Bylaws shall be deemed to be, and shall be, effective for all purposes and in all respects as of the date of the Board's approval of such revised Bylaws.

Engagement Programs



The Jewish Federation
OF GREATER WASHINGTON

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ENGAGEMENT PROGRAMS

Next DC: Beyond Birthright Israel

NEXT DC is dedicated to fostering an ongoing relationship among the more than 18,000 Birthright Israel alumni in the Greater Washington area. Through opportunities to celebrate Shabbat together, volunteer, hone leadership skills and explore their relationship with Israel through educational programming, NEXT DC ensures that Birthright is the start of a journey that continues long after the 10 days are over.

- More than **100 alumni** have traveled back to Israel on the **NEXT DC Alumni Leadership Mission**.
- Since 2008, hundreds of DC-area young adults have become more engaged in our local Jewish community through **Reverse Mifgash**—an immersive journey that brings Israeli Birthright Israel alumni to DC for a unique, transformative experience.
- Young adults with a passion for *tikkun olam* (repairing the world) volunteer together at hands-on social action projects with local peers through NEXT DC's **Mitzvah Hoppin'** initiative.





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ENGAGEMENT PROGRAMS

Federation's Sara & Samuel J. Lessans Good Deeds Day

Each Spring, thousands of community members from across Greater Washington join together to make a difference on Federation's Sara & Samuel J. Lessans Good Deeds Day.

What is Good Deeds Day?

Good Deeds Day is an annual, international celebration of Doing Good! Join more than half a million volunteers around the world for this day of service, putting into practice the simple idea that every single person can make a positive impact on the lives of others and change the world. Roll up your sleeves and make an impact through a variety of hands-on volunteer projects.

What types of service projects can I take part in?

Whether you want to dance the day away with senior citizens, prepare and serve lunch to the homeless, help unite dogs with their forever homes or even help clean up a local park, your perfect project awaits. Let's show the international Jewish community Greater Washington's passion for social action!

What's the history behind Good Deeds Day?

Businesswoman and philanthropist, Shari Arison conceptualized the idea for Good Deeds Day, and launched in 2007 by *Ruach Tova* ("Good Spirit" in Hebrew), the leading organization in the field of volunteering in Israel. Good Deeds Day celebrates the value and importance of giving back to the community we live in.

Learn more—and join us this April—by visiting gooddeedsdaygw.org



"It meant a lot for us to be a part of Good Deeds Day. My dad, Jack, of blessed memory, was a Holocaust survivor, so I know how important having connections and being a part of the Jewish community is to them. We are all connected to help and inspire each other!"

—MARILYN BINSTOCK SPENADEL



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ENGAGEMENT PROGRAMS

Jteen Philanthropy

Jteen Philanthropy offers the opportunity for teens to engage in hands-on philanthropy while learning the Jewish values of *tzedakah* (charity), *gemilut chasadim* (acts of loving-kindness) and *tikkun olam* (repairing the world). Jteen programming goes beyond a simple *tzedakah* lesson or fundraising project and empowers teen leaders to impact lives locally and worldwide.

Jteen philanthropy programming goes beyond a simple fundraising project. By engaging teens in collective philanthropic giving, this program helps youth understand charitable obligations on a much deeper level.



“JTeen Philanthropy has been an incredible opportunity for all of us to learn about highly important social causes, financing and organizational operations. The funds that we were offering were significant enough that candidate organizations took us seriously. They shared with us their goals and strategies, and their strengths and weaknesses. It was a challenge to decide how much money to give to which organization.”

—MEREDITH SCHULHOF
Jteen Graduate



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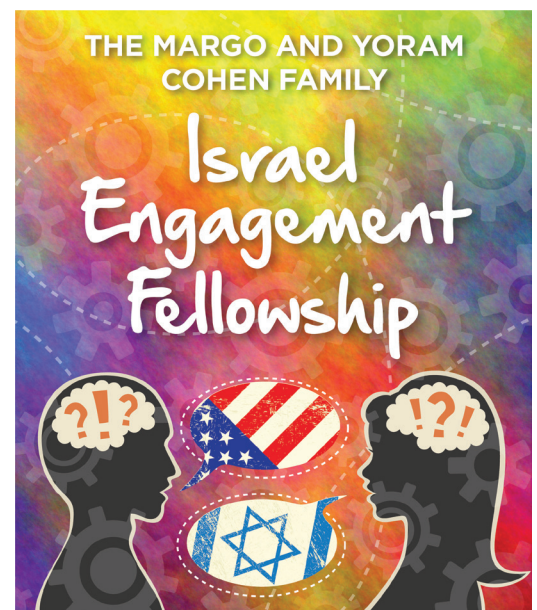
ENGAGEMENT PROGRAMS

The Margo & Yoram Cohen Family Israel Engagement Fellowship (IEF)

presented in partnership
with JCRC

IEF empowers teens to develop an understanding of the history of Israel, the modern political situation and how to apply these lessons in our community and on their future college campuses. Today, 80 high school students are graduates of this elite Fellowship. The impact?

- 96% of Fellows would definitely recommend the Fellowship to their friends.
- 100% of parents reported that, at the conclusion of the Fellowship, their teens had a stronger connection to Israel.



“IEF challenged me to think differently—to find ways to build on the strengths of my Jewish education and all that I have learned from my teachers, rabbis and parents. IEF opened my eyes to a new world in which I understand the power I have as a student to advocate for Israel, guide the conversation with respect and inspire others to join me.”

—JESSIE B.
IEF graduate



The Jewish Federation
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ENGAGEMENT PROGRAMS

PJ Library® in Greater Washington

The Jewish Federation of Greater Washington is home to our community's PJ Library® program. PJ Library provides free, carefully curated Jewish books and music to local families raising Jewish children, ages 6 months–8 years. Every month, PJ Library families receive a Jewish book or CD as a gift from the community, and regularly attend PJ Library-sponsored events throughout the area.

- More than 6,400 families in 205 zip codes receive a Jewish book in the mail each month.
- In the last year, PJ Library has co-sponsored 411 programs for families throughout the Greater Washington area. More than 6,800 families attended these programs.
- PJ Library partners with 60 Jewish organizations, agencies and congregations to offer programs and expand PJ Library's and Federation's reach.



"I feel like we should be your walking advertisement for PJ Library—my daughter LOVES getting her books every month. They have added to her understanding and love of Jewish holidays and customs...My daughter... really enjoys her Jewishness—I am sure PJ Library has contributed to that.

Thanks for all you do!"

—PJ PARENT



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ENGAGEMENT PROGRAMS

Honeymoon Israel

Honeymoon Israel, empowered by funding from Federation, provides subsidized trips to Israel for couples with at least one Jewish partner, but the adventure does not end when couples return to Greater Washington. After the trip, participants are empowered to build and strengthen their new community of peers. In Greater Washington, alumni groups are organizing Chanukah parties, Passover seders, Shabbat dinners, fertility groups, volunteer projects and more—forging Jewish community and discovering meaningful ways to incorporate Judaism in their lives.



“Honeymoon Israel was one of the best experiences of my life. The connections we both formed with our new Jewish community have reinvigorated my love for my culture and given my husband a confidence in claiming his relationship with Judaism that I only wished was possible”

—KENDRA R.
Honeymoon Israel Participant



The Jewish Federation
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ENGAGEMENT PROGRAMS

J.Family Ambassadors

For families with young children living in Northern Virginia, the j.family ambassadors initiative makes the NoVA Jewish community more welcoming, inviting and accessible by connecting families to Jewish programming, resources and to each other. The program is fully funded by Federation and presented in partnership with JCCNV, and will expand in the coming year to Montgomery County and Washington, DC in partnership with the Bender JCC of Greater Washington and the Edlavitch DCJCC.



“When we started a family, we knew almost no one Jewish in Northern Virginia. I had no idea the impact the program would make to our lives over the last couple years. The feeling of welcoming, of entering into a Jewish community I didn’t even know existed was so amazing! This program has enriched our lives more than we could have ever imagined”

—CHERYL K.

j.family ambassadors participant



The Jewish Federation
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ENGAGEMENT PROGRAMS

Imagine Israel

Federation's multi-faceted Israel engagement initiative places a special focus on issues of social justice and civil society. Imagine Israel inspires, engages and educates Washingtonians through a variety of social impact-oriented programs, including:

Changemakers Series:

Federation brings renowned Israeli agents of change to Washington to share their personal stories with community members and discuss how they are working to solve some of the most pressing social issues in Israel. While in Washington, Imagine Israel Change cultivate relationships with local organizations, creating new partnerships and innovation opportunities between Washingtonians and Israelis.

Podcast:

Federation's Imagine Israel Podcast connects listeners to a modern, relatable Israel in real-time, through stories from innovative Israeli influencers leading social change in Israel, with a special focus on issues of social justice and civil society. Tune in on your podcast app or by visiting shalomdc.org/imagineisraelpodcast.

Triangular School Partnership:

In partnership with NGO The Abraham Fund Initiatives, Imagine Israel established a triangular school partnership between Charles E. Smith Jewish Day School, a Jewish Israeli school and an Arab Israeli school. During the 2016–2017 school year, teachers at all three schools worked intensively to build trust and develop a joint curriculum to be used in a high school classroom during the 2017–2018 school year.





The Jewish Federation
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ENGAGEMENT PROGRAMS

Celebrating Israel

For more than 10 years, The Jewish Federation of Greater Washington has partnered with the Bender JCC of Greater Washington and the Jewish Community Center of Northern Virginia (and, in some years, the Edlavitch JCC of Washington DC) for one large Israel festival every 5 years, with festivals in MD and VA during the years in between.

On Sunday, June 3, 2018, The Jewish Federation of Greater Washington, in partnership with the outstanding Israel@70 committee members and event donors, brought together our Jewish community for an incredible celebration. From the exciting Israeli musical performances to numerous family-friendly art projects and enticing giveaways, the event was an amazing experience for more than 2,000 attendees from many different parts of our community.





The Jewish Federation
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ENGAGEMENT PROGRAMS

Federation's Jewish Food Experience®

Federation's Jewish Food Experience® (JFE) (jewishfoodexperience.com) connects Jewish community members to their heritage, to their community and to one another. JFE®'s unique online and offline approach to engagement encourages Jewish community members to participate in Jewish life by making it easily accessible and welcoming through the language of Jewish food.

"JFE® is the ultimate connector, bringing together DC area Jews of all stripes to share their diverse passions for food in creative ways, both online and offline."

—SARAH NEWMAN, FOOD INSECURITY ACTIVIST
AND INTERNATIONAL BLOGGER





The Jewish Federation
OF GREATER WASHINGTON

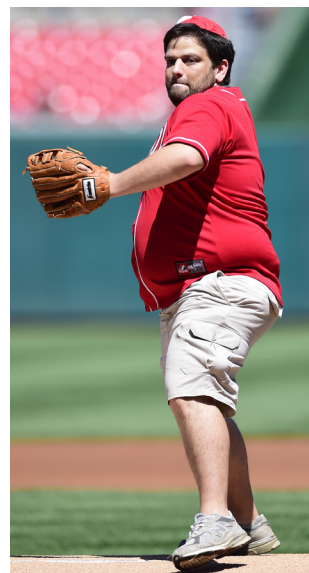
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ENGAGEMENT PROGRAMS

Grand Slam Sunday

Federation's annual Jewish Community Day at Nationals Park has become a favorite event for Jewish Washingtonians of all ages, bringing together individuals and families from across area synagogues, schools, youth groups and organizations to network, mingle, enjoy fun activities and cheer on the Nats.

A portion of the proceeds from each Grand Slam Sunday ticket supports Federation's work in Greater Washington, in Israel and around the world.





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ENGAGEMENT PROGRAMS

Reverse Mifgash

Reverse Mifgash (encounter) is a 10-day immersive experience in Washington, DC, bringing together American and Israeli alumni of Birthright Israel: DC Community trips and members of the Greater Washington Jewish community for social, educational, cultural and religious programming. The American alumni open their homes to the Israelis, creating meaningful opportunities to learn from one another, build lasting friendships and deepen their connections to Israel and the Jewish community.



Glossary of Terms



GLOSSARY OF TERMS

FULL NAME	ABBREVIATION
Annual Campaign (Federation's)	AC
Bender JCC of Greater Washington	Bender JCC
Capital Camps and Retreat Center	CCRC
Capital Leadership Circle	CLC
Charles E. Smith Day School	CESJDS
Charles E. Smith Jewish Life Communities	CESLC
Create a Jewish Legacy	CJL
Directed Gifts	DG
Direct Response—Dept of Federation	DR
Edlavitch DCJCC	EDCJCC
Executive Committee of Federation	EC
Financial Resource Development—Dept of Federation	FRD
Gay & Lesbian Outreach and Engagement	GLOE
Gesher Jewish Day School	Gesher JDS
Human Resources—Dept of Federation	HR
Human Resource Development for Lay Leaders— Dept of Federation	HRD
Information Technologies— Dept of Federation (currently outsourced)	IT
Initiatives in Congregational Education	ICE
Israel and Overseas	I&O
Israel Emergency Campaign	IEC
Melvin J. Berman Hebrew Academy	Berman
Milton Gottesman Jewish Primary Day School of the Nation's Capital	Milton JDS

FULL NAME	ABBREVIATION
Jewish Agency for Israel	JAFI
Jewish Community Center of Northern Virginia	JCCNV
Jewish Community Relations Council	JCRC
Jewish Council for the Aging	JCA
Jewish Federations of North America	JFNA
Jewish Food Experience	JFE
Jewish Foundation for Group Homes	JFGH
Jewish Life & Learning—Dept of Federation	JLL
Jewish Social Service Agency	JSSA
American Jewish Joint Distribution Committee	JDC
Philanthropic Leadership—10k+	MG or PL
Masa Israel	Masa
Multi Generational Programming— Federation Initiative	Multi Gen
Special Nominations Committee	SNC
Strategic Planning & Allocations—Dept of Federation	SP&A
Tikkun Olam Women's Foundation	TOWF
United Jewish Endowment Fund	UJEF
Unrestricted Annual Campaign	UR-AC
Vice President	VP
Young Leadership	YL
Women's Philanthropy	WP