

# 2019 Combined Annual Meeting



**THE STRENGTH OF A PEOPLE.**

**THE POWER OF COMMUNITY.**

# Message to OUR COMMUNITY

We are honored to recognize a group of caring and engaged leaders this year. Our honorees care deeply about growing and sustaining a thriving Jewish community, and give of themselves generously. Their efforts will help carry on the chain of our tradition for generations to come.

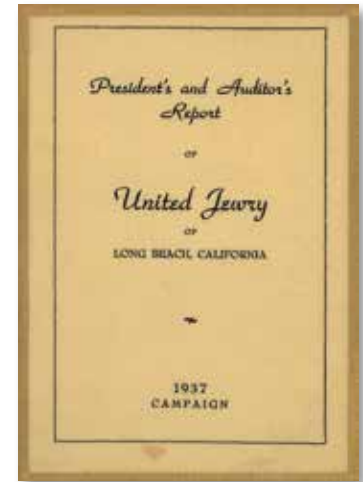
The Robert Baldwin Community Service Award is bestowed this year on Lea Gerber. Lea, a past President of the Jewish Community Foundation, has served in numerous leadership roles in both the Jewish and general community. Her love of Israel and her volunteer activities truly epitomize the spirit which Bob Baldwin sought to perpetuate.

Lauren Friedman and Rachel Suojanen are this year's recipients of the Fred Neuburger Young Leadership Award. As active community volunteers, both Lauren and Rachel have served on the Women's Philanthropy Cabinet, as well as for numerous community organizations. This past April, under Lauren and Rachel's amazing leadership, Women's Philanthropy hosted a Prom Dress Boutique which helped make prom dreams come true for over 150 needy students.

Along with Lauren and Rachel, we recognize 8 emerging leaders graduating from the Alpert New Leaders Forum program. We are excited about the roles they will play as they become more active in our agencies and synagogues.

We are most excited to recognize and thank our outgoing board members who have given generously of their time, and to celebrate the consolidation of our two organizations in the coming year.

Thank you to all of our donors, supporters, volunteers, and agency partners for all you do to move our community from strength to strength. We could not succeed without you.



A handwritten signature in black ink that reads "Deborah K. Goldfarb".

**Deborah K. Goldfarb**  
Chief Executive Officer



A handwritten signature in black ink that reads "Laurie Raykoff".

**Laurie Raykoff**  
Jewish Federation President



A handwritten signature in blue ink that reads "Jan Stein".

**Jan Stein**  
Jewish Community Foundation President

**As a leader in supporting Jewish causes here at home and across the globe for 70 years, the Jewish Federation and Jewish Community Foundation of Greater Long Beach & West Orange County continue to unify and connect the Jewish community through effective fundraising and philanthropic resources, planning, community collaborating, providing essential services and activities and developing leaders for our future.**

# Programs

## Alpert New Leaders Forum

## Annual Community Campaign

Advanced Gifts Recognition Event  
Beneficiary Agencies & Synagogues  
Priority Grants  
Operations Allocations  
Lentzner Family Major Gifts Event  
Men's Philanthropy Division  
    Above & Beyond Event  
    Shield of David Gold Society  
    Shield of David Silver Society  
Opening Night Campaign Kick-off  
Super Sunday Phone-a-thon  
Women's Philanthropy Division  
    Arlene Solomon Visions Event  
    Lion of Judah Society  
    Pomegranate Society  
    Shabbat Meals on Wheels

## B'nai Tzedek Youth Philanthropy

## Community Collaborative Programs

Yom HaShoah Commemoration  
Yom Ha'Atzmaut Celebration  
Long Beach Jewish Film Festival  
Purim Carnival

## Community Education Programs

## Corporate Partners

## Create a Jewish Legacy

Bequest in Will or Trust  
Appreciated Assets or Cash  
Life Insurance Policy  
IRA or Retirement Plan  
Charitable Remainder Trust  
Charitable Gift Annuity

## Financial Management & Administration

Professional Investment Advisors

## Funds Established & Managed

Donor Advised Philanthropic Funds  
LOJE - Lion of Judah Endowments  
Named Endowment Funds  
PACE - Perpetual Annual Campaign Endowments



## WOMENS PHILANTHROPY

**46** members  **LION OF JUDAH SOCIETY** minimum gift of \$5,000  
**32** members  **POMEGRANATE SOCIETY** minimum gift of \$1,800  
**31** members  **GUARDIAN SOCIETY** minimum gift of \$1,000



## MENS PHILANTHROPY

**31** members  **SHIELD OF DAVID GOLD SOCIETY** minimum gift of \$5,000  
**25** members  **SHIELD OF DAVID SILVER SOCIETY** minimum gift of \$1,800  
**37** members  **SOLOMON SOCIETY** minimum gift of \$1,000

## Grant Making

Robert Baldwin Israel Experience Grants  
Donor Designated Grants  
General Unrestricted Grants  
Program Specific Grants

## Israel Advocacy & Education

## Jewish Community Chronicle

## Kehillah Community Leadership Council

## Legacy Society Recognition

## Lentzner Leadership Fellows

## PJ Library

## Weinberg Jewish Federation Campus

## Young Adult Engagement

**Chronicle** **7,000**  
Mailed Monthly to Over **7,000** homes

**\$25M+**  
In Future Legacy Promises  
from **76**  
Legacy Society Families

# Jewish Community GRANTS \$1,259,841

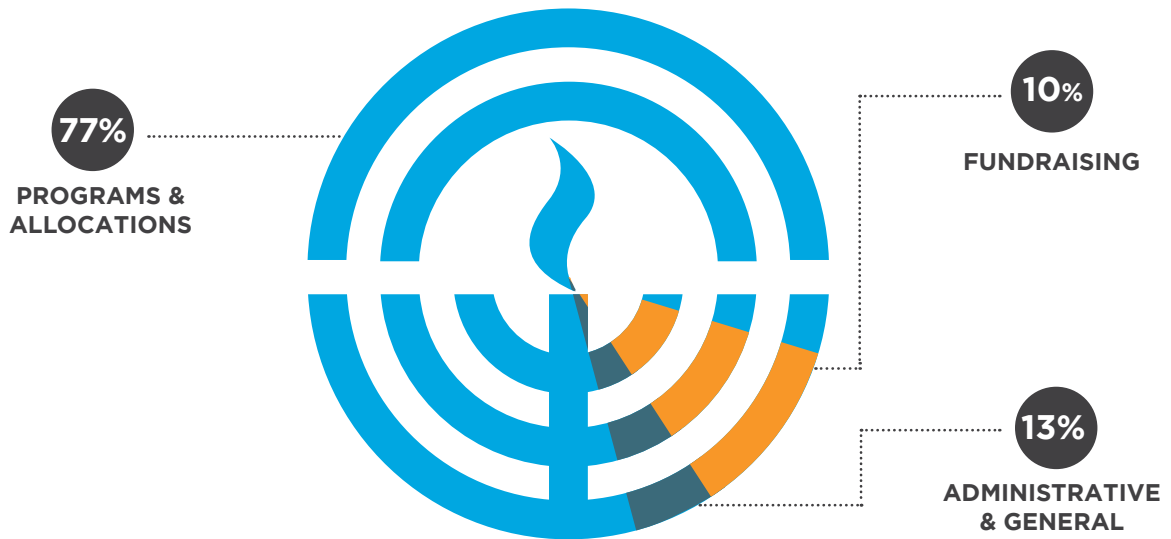
AJCC - Evelyn Baldwin Speakers Endowment Grant	658.00
AJCC - Gerda Seifer Yom HaShoah Fund Grant	1,216.00
AJCC - Roska Senior Lunch Endowment Grant	202.00
AJCC Core - Campaign Operations Grant	70,434.00
AJCC Grant - New Family Film Series	10,100.00
Annual Campaign - Lion of Judah Endowments (LOJE)	8,374.00
Annual Campaign - Perpetual Annual Campaign Endowments (PACE)	46,657.00
Bob Baldwin Fund Israel Grants	10,000.00
Chabad Los Alamitos Grant - Kosher Meal/Visitations	2,500.00
Davis Senior Transportation Grants	8,765.00
Federation Leadership Develop Program Grants	93,742.00
Federation Tower - Jacobs Fund Senior Service Program Grants	11,000.00
Federation/JCF - Program Fund Grants	7,042.00
Federation/JCF Annual Campaign Speakers Grant	1,469.00
Federation/JCF Campaign Operations Grant	406,623.00
Hebrew Academy Core - Campaign Operations Grant	18,149.00
Hebrew Academy Grant - Universal Design Inclusive Classrooms	10,360.00
Hillel Core - Campaign Operations Grant	11,718.00
Hillel Grant - Eva Cooper Operations Grant	29,215.00
Hillel Grant - Campus Services Program Fund	6,738.00
Hillel Grant - Student Engagement	10,300.00
Israel & Overseas Jewish Needs Grant	94,193.00
JFCS - Endowment Fund Program Grants	4,509.00
JFCS Core - Campaign Operations Grant	32,397.00
JFCS Grant - Hebrew Academy Student Mental Health	11,211.00
JFCS Grant - Holocaust Claims Matching Grant	6,211.00
Jewish Federations of North America (JFNA) Dues Grant	39,115.00
NCJW - Barbara Alpert Fund Grant	2,077.00
Regional/National Organization Campaign Grants	3,000.00
Sharon Carmel Hadassah - Barbara Alpert Fund Grant	2,026.00
Shul by the Shore Grant - Public Menorrah Lighting	2,500.00
Temple Beth David Grant - Teen Social Justice Seminar	2,500.00
Temple Israel Grant - Post College Young Adult Engagement	2,400.00
Weinberg Jewish Federation Campus Fund Grant - Annual Maintenance	292,440.00

## Local Beneficiary Agencies

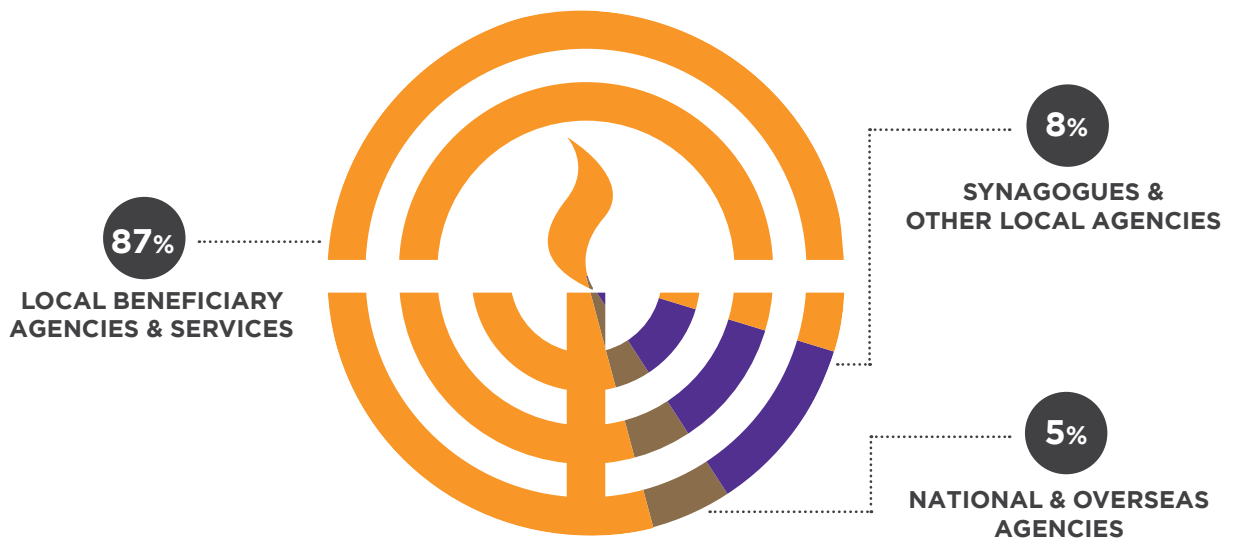


# Combined Financials

Efficient Use of Your Dollars\* (Year Ending June 30, 2018)



Agencies Benefiting from Allocations & Distributions (Year Ending June 30, 2018)



## Corporate Partners



# Combined Financials

## Consolidated Statement of Activities

(Year Ending June 30, 2018)

### Support & Revenue

Contributions	2,120,187
Investment Income (Loss)	787,662
Programs & Events	128,011
Jewish Community Chronicle	74,745
Other Income	468,903
<b>Total Support &amp; Revenue</b>	<b>3,579,508</b>

### Expenses

Programs & Allocations	2,398,774
Administrative & General	414,205
Fundraising	325,167
<b>Total Expenses</b>	<b>3,138,146</b>

**CHANGE IN NET ASSETS \$ 441,362**

## Consolidated Statement of Financial Position

(Year Ending June 30, 2018)

### ASSETS

#### Current Assets

Cash & Cash Equivalents	868,976
Investments	16,859,918
Receivables: Campaign Pledges	259,509
New Campus Pledges	0
Supplemental Pledges	116,747
Other Receivables	98,938
Fund for our Future	9,200
Prepaid Expenses	8,510
<b>Total Current Assets</b>	<b>18,221,798</b>

#### Non-Current Assets

Property & Equipment	8,895,221
Life Insurance	331,040
Charitable Remainder Trust Assets	1,205,393
<b>Total Non-Current Assets</b>	<b>10,431,654</b>

**TOTAL ASSETS \$28,653,452**

### LIABILITIES & NET ASSETS

#### Liabilities

Accounts Payable & Accrued Liabilities	64,021
Jewish Federation of North America	116,584
Grants Payable	182,568
AJCC Campus Refurbishment Loan	282,000
Campus Lease Obligation	1,438,733
Funds of Affiliated Organizations	2,622,531
Charitable Remainder Trust Liability	1,205,393
<b>Total Liabilities</b>	<b>5,911,830</b>

Unrestricted Net Assets	10,710,982
Temporarily Restricted Net Assets	4,524,054
Permanently Restricted Net Assets	7,506,586

**Total Net Assets 22,741,622**

**TOTAL LIABILITIES & NET ASSETS \$28,653,452**



# Combined Financials

## Allocations & Distributions

(Year Ending June 30, 2018)

<b>Local Beneficiary Agencies &amp; Services</b>	<b>Federation Annual Allocations</b>	<b>Federation Supplemental Allocations</b>	<b>Foundation Grants &amp; Distributions</b>	<b>Total Support &amp; Expenses</b>
AJCC Programs/Facilities Grants	119,489	353,069	26,100	498,658
Federation/Foundation Administration	135,798	247,842	22,180	405,820
Federation/Foundation Fundraising	156,905	161,496	1,375	319,775
Federation/Foundation Outreach/Programs	105,533	183,024	7,835	296,392
Hebrew Academy	30,790	7,384	11,600	49,774
Hillel Programs/Facilities Grants	19,879	46,086	54,643	120,608
JFCS Programs/Facilities Grants	54,961	50,767	21,596	127,324
LB Senior Housing/Federation Tower			7,000	7,000
Weinberg Federation Campus Shared Services	31,098	2,750		33,848
Weinberg Federation Campus Maintenance	113,162	142,514	110,138	365,814
<b>Weinberg Federation Campus Capital</b>				
Roof Replacement (partial expenditure)		420,526	50,000	470,526
Gym Floor Replacement		210,887		210,887
HVAC Additions		87,944		87,944
ECE Playground Improvements		30,083		30,083
Solar System Installation		25,661		25,661
Other Campus Critical Needs	55,000	27,749		82,749
<b>Overseas</b>				
Israel Donor Designations			20,000	20,000
Jewish Federations of North America	136,035	7,550	900	144,485
<b>National Agencies</b>				
Birthright Israel	1,000		3,100	4,100
Israel Action Network	500			500
<b>Local Agencies &amp; Synagogues</b>				
ADL Long Beach/Orange County	750		4,875	5,625
Chabad of Los Alamitos			2,500	2,500
Hadassah			4,172	4,172
NCJW			2,484	2,484
Shul by the Shore			1,410	1,410
Temple Beth David			7,680	7,680
Temple Israel			28,075	28,075
<b>Other Grants</b>			229,807	229,807
<b>TOTAL SUPPORT AND EXPENSES</b>	<b>\$ 960,900</b>	<b>\$2,005,332</b>	<b>\$ 617,470</b>	<b>\$3,583,702</b>
<b>Capitalized Items</b>				<b>(\$ 907,850)</b>
<b>Expensed Items</b>				<b>\$2,774,486</b>
<b>Change in Net Assets</b>				<b>\$ 441,362</b>
<b>Depreciation</b>				<b>\$ 461,544</b>
<b>TOTAL SUPPORT AND REVENUE</b>				<b>\$3,579,508</b>

## Our Mission

The Jewish Federation and Jewish Community Foundation of Greater Long Beach & West Orange County strengthen Jewish life and fulfill critical human needs at home, in Israel, nationally and worldwide through central planning, resource mobilization and leadership.

## 2018-2019 Jewish Federation & Jewish Community Foundation

# STAFF

Deborah K. Goldfarb  
Chief Executive Officer

Danny Levy  
Director of Development

Sharon Kenigsberg  
Director of Endowments & Community Development

Gary Jackson  
Controller

Yolanda Placencio  
Office Manager/Executive Assistant

King Chan  
Chronicle/Marketing Coordinator

Audrey Phan  
Bookkeeper

Paul Anaya  
Accounting Assistant



Jewish Federation  
Jewish Community Foundation  
OF GREATER LONG BEACH & WEST ORANGE COUNTY

THE **STRENGTH** OF A PEOPLE.  
THE **POWER** OF COMMUNITY.

Harry & Jenette Weinberg Jewish Federation Campus  
One Sommer Way  
3801 East Willow Street, Long Beach, CA 90815

[jewishlongbeach.org](http://jewishlongbeach.org)