

ANNUAL REPORT 2018



JCCFEDERATION

of San Luis Obispo

Building Jewish community locally, connecting globally

2/20/2019

JCC-Federation of San Luis Obispo

Another extraordinary
year made possible by you

Annual Report 2018

JCC-FEDERATION OF SAN LUIS OBISPO

THANK YOU

For helping us get to where we are

- Continued success in community building and advocacy through our programs and services
- Reached over 1700 members in 2018
- 20% Increase in Repeating Donors
- 10% Growth in Program Attendance
- 20% Increase in Camper Scholarships
- Nationally and locally recognized as fastest growing organization of its kind in the country

Our Impact

Over **10,000** individuals engaged with the JCC-Federation in 2018, thanks to your support. This means thousands of people attended our programs, visited our website, volunteered their time, or requested agency services. We are proud in how this impact reverberates throughout SLO County and achieves our mission as the local Jewish community center and Federation.

Financial Highlights

This report includes our pre-audited annual financial report. Major highlights of 2018 include:

- Balanced budget with surplus
- Operated with over **\$163,000 of in-kind services and donations**

Revenue (% of Total)	
Annual Campaign	46%
Special Events and Programs	27%
Sponsorships and Grants	15%
Camp	10%

Expenses (% of Total)	
Programs	60%
Personnel	30%
Infrastructure	10%

2018 ACCOMPLISHMENTS

The JCC-Federation of San Luis Obispo was proud to have enhanced community in these new and engaging ways:

- **Increased Social Media Focus:** Online presence matters and reaches thousands. Our 2018 Leadership Fellow has expanded our online reach by approximately 30%.
- **SLO Jewish Film Festival at Communities Together Celebrate King:** JCC-F's SLO Jewish Film Festival screened two free community movies, as a part of the larger first MLK Day program hosted at Congregation Beth David in partnership with diverse community groups.
- **Expanded Youth Programs and Festivals:** Pizza and pool parties and a bigger Apples & Honey Festival were big hits in 2018. Also our Hanukkah float in the SLO Holiday Parade!
- **New Social and Cultural Opportunities:** We were thrilled to welcome the internationally acclaimed musician, Itzhak Perlman, to San Luis Obispo. Other 2018 memories included our Kosher Wine Social, the Israel Festival, and the Fall Harvest Concert at Atascadero Lake Park. We think we made history there with the first public hora dance outside the lake pavilion!
- **Community Grants Program:** 2018 was our second year of awarding nearly \$1500 in community grants to local Jewish 501c3 organizations. The grants are designed to enable local Jewish organizations to implement broad community-based programs for the Central Coast.
- **Continued Property Development:** This past year JCC-F invested in a new shed for our camp office and storage. There were efforts to advance Master Plan projects, including the Outdoor Theatre. Also enhancing the property usage is Saplings, the outdoor nature based program that runs year-round. JCC-F serves as the program's fiduciary agent and host.
- **Jewish Family Services assistance:** Wider community awareness of our JFS micro-grants program increased in 2018, resulting in a higher client call volume each month. In most instances, our JFS coordinator is able to connect the client with an existing local service.
- **SLO Jewish Summit, Community Plan, and President's Council:** Many efforts in 2018 focused on surveying, brainstorming, and identifying needs in our area Jewish community. Advancements in those efforts resulted in quarterly meetings with area organizational presidents, as well as the annual summit for community members to partake in developing the Jewish community plan.

2019 INITIATIVES

The JCC-Federation of San Luis Obispo is pleased to announce the following programs and services to be launched this calendar year:

- **Central Coast Festival for Jewish Learning:** The JCC-Federation is collaborating with Hillel of San Luis Obispo to develop a new special festival featuring authors, philosophers and speakers for our community and campus.
- **Property Usage and Development:** The JCC-Federation will continue hosting outdoor events at the property. A focused initiative implementing the updated Master Plan continues.
- **Hillel Leadership Fellows and Increased Community Engagement:** Each quarter, 1-2 students from Hillel of San Luis Obispo are to learn and lead in programming.
- **Relocation of Operations:** The JCC-Federation of SLO is moving its operational headquarters inside Congregation Beth David to increase synergy, communication, and programming.

Financial Statements

STATEMENT OF FINANCIAL POSITION DECEMBER 2018 AND 2017

	<u>2018</u>	<u>2017</u>
Assets:		
Cash and cash equivalents	50,047 ⁱ	34,358
Fixed Assets (Land, buildings, and equipment):		
Land	220,000	220,000
Buildings	645,000 ⁱⁱ	645,000
Furniture and Equipment	718	1,818
Accumulated Depreciation	(243,941)	(227,403)
Acc Depreciation (Furn & Equip)	(1,979)	(1,908)
Intangible Assets	80	100
Total	619,877	638,715
Other Securities (tenant obligation)	176,476 ⁱⁱⁱ	181,617
Total Assets	<u>846,400</u>	<u>853,582</u>
Liabilities and net assets:		
Short-term liabilities	0	0
Long-term debt (mortgage)	256,767	264,247
Total	256,767	264,247
Net Equity:		
Unrestricted Assets	579,635	574,843
Temporarily Restricted	6,093	6,093
Retained Earnings	(8,290) ^{iv}	(1,284)
Net Income	12,194	7,114
Total Equity:	589,632	589,335
Total liabilities and net assets:	846,400	853,582

ⁱ All figures are rounded to the nearest whole dollar amount.

ⁱⁱ Tenant invested in construction of a community room.

ⁱⁱⁱ **This figure reflects the balance owing of our tenant's responsibility towards our mortgage. The land is owned wholly by JCC Federation-SLO, our tenant is obligated to pay an agreed upon percentage of our mortgage. JCC net mortgage liability is the long term debt less other securities. For end-of-year 2018, this amount is \$75,150.**

^{iv} This is not an operational loss, it is due to additional depreciation expense we are entitled to and reported on our Form 990, per CPA tax adjustments.

Financial Statements

STATEMENT OF ACTIVITIES YEAR ENDED DECEMBER 31, 2018

	<u>2018</u>	<u>2017</u>
Unrestricted revenues and gains:		
Contributions & Programs	117,516	107,309
Income from property, plant, and equipment	500 ⁱ	6,636
Other investment income	0	128
Tributes & Bequests	0	10,000
Total Unrestricted Revenues and gains:	118,017	124,224
Unrestricted expenses and losses:		
Management and general	31,668	25,540
Fundraising	5,113	6,447
Programming	58,451 ⁱⁱ	70,970
Expenses for property, plant and equipment ⁱⁱⁱ	11,031	14,152
Total Unrestricted expenses and losses:	106,043	117,109
Gain (Loss) in temporarily restricted net assets:	0	(1,004)
Change in net assets	12,194	7,115
Net assets at beginning of year	589,335	582,211
Net assets at end of year	601,529	589,335

ⁱ This reflects the termination of land-based, revenue-generating program that was hosted on JCC-Federation property

ⁱⁱ Significant reduction in property programming expenses

ⁱⁱⁱ Includes depreciation expenses

Leadership Circle Donors

The JCC-Federation of San Luis Obispo extends its gratitude to our contributors at all levels of support. We acknowledge our Leadership Circle donors for their exceptional level of giving.

*Leadership Circle donations start at \$500. Names in **bold** indicate donations of \$1800 or more.*

Libbie Agran	Joseph Fram & Bonnie Birch	Bernadette Pekarek & William Martony
AJRWeb, Inc	Arthur & Cindy Fries	Judith Propp
Raymond & Whitney Almaguer	Hildy Gal	Esther & George Pudlo
Anonymous Donor	Victoria Grostick	Patti & Robbie Robbins
Ron & Sandra Baers	Cricket Handler & Jerry Boots	Fred & Frieda Russell
Judith & Ken Barclay	Jaime & Robert Hill	Irwin & Gail Schwartz
Lauren & Armin Bandari	Brenda & Jules Hock	Susan Schneider & Joel Siegel
John & Jody Belsher	Jake & Wendy Kaufman	Robert & Beth Segal
Mary L. Bianco	Susie & Ben Lerner	Sandra & Isaac Shafran
Linda Blonsley	Margaret & David Levine	Mark Sherman & Denise Barilla
Carson and Natalie Britz	Luna Red	Steven Singer
Kate Bunnell	Mrs. Kelly Ann Lynch	Ellen & Josh Sklar
David Canvasser	The Madonna Inn	Susan Stern-Pearl
City of San Luis Obispo	Jay Melnick & Lisa Marmon	Adrienne & Jim Shivers
County of San Luis Obispo	Diane & Pat McKeague	Sonrisa Photography
Vernanne Cohen	Rabbi Janice Mehring	Sharlot Sunshine
Epoch Wines	Liz Ruderman Miller	SLO Provisions
Elisa Feingold	Susan Minker	Don & Patsy Tullman
Bluma & Edward Felix	The MOCA Foundation	Heidi & Bob Turbow
Charles Fishman	Mimi Naish & Chris Toews	Toews Law, Inc.
	Ellen & Leon November	

2018 JCC-Federation Donors and Contributors

The JCC-Federation of San Luis Obispo extends its gratitude to...

Congregation Beth David

Congregation Ohr Tzafon

Temple Ner Shalom

Chabad of SLO/Cal Poly

William Alexander & Linda Baker

Marsha & Ira Alpert

Michael & Susan Aroner

Elie Axelroth & Maxine Stein

Virginia Kajikawa Baker

Bank of the Sierra

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Debra Barriger

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Ronald & Linda Becker

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Tom & Judy Freeman

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Randall & Judith Harris

Elana Harway & Mark Sada

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Schoolyard Communications	Paul & Marion Wolff
Harvey Schwartzman	Ron Yukelson
Barbara Scott	Gary & Joyce Zanini
Linda Seeley	Roxanna & Rami Zarnegar
Sara & Aric Shafran	

EXECUTIVE DIRECTOR MESSAGE

When I took on the leadership role nine years ago, I certainly could not have imagined the growth and sustained impact of our agency. As the area's JCC and Federation, we strive to bring to the community programs that are engaging and cultural, serve as the nexus to community organizations and the global Jewish network. We run a camp, a film festival, a Jewish Family Service, cultural programming, and try to inspire connections. We do a lot, and we truly love it.

Thank you for being a part of this adventurous ride in community building. Because of your support in 2018, we engaged more people of many ages and backgrounds, provided more service and community advocacy, and maintained healthy operations. But amidst the great triumphs of the past year, we look forward to the challenges of next.

So, we invite you to stay with us as we continue this charge as the JCC-Federation for San Luis Obispo County. We welcome you to push us to higher places, and take on leadership roles in your support and advocacy. We cannot do any of this without you – thank you.

Sincerely,



Executive Director, JCC-Federation of SLO

Staff and Board of Directors

2019 Incoming Board:

Adrienne Shivers (President), Stephanie Carlotti, Vernanne Cohen, Elisa Feingold, Brenda Hock (Treasurer), Jake Kaufman, Liz Ruderman Miller, Mimi Naish, Ellen Sklar (Secretary), Gail Schwartz, Susan Stern-Pearl, Bob Spector (past president)

Staff:

Lauren Bandari, Executive Director, Loren Denker, Office Manager,
Julia Valentine, Camp and Property Director

2018 Award Recipients and Acknowledgements:

Martin L Meltz Volunteer of the Year - Judy Uffens
Business Partner of the Year - Gopher Glen Apple Farm
W David Conn Diversity Advancement Award - Planning Committee, Communities Together Celebrate King
Teen Service Awards - Catrina Sada and Becca Shivers
Executive Director Outstanding Service Awards - Rosa Britz and Carol Berger

Agency Information:

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