

# ANNUAL REPORT 2019



**JCCFEDERATION**

of San Luis Obispo

Building Jewish community locally, connecting globally

2/10/2020

JCC-Federation of San Luis Obispo

Another extraordinary  
year made possible by you

# Annual Report 2019

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 - both within our area's Jewish community and with our extended community
- Grew to over 1800 members in 2019
- Secured \$30,000 for the organization for 5-year period
- 10% growth in program attendance; 30% increase in social media reach

## Our Impact

Over **47,000** individuals engaged with the JCC-Federation in 2019, thanks to your support! This year was our **highest level of engagement ever**, and means thousands of people attended our programs, visited our website, volunteered their time, or requested agency services. We are proud of how this impact reverberates throughout SLO County and achieves our mission as the area Jewish Community Center and Federation.

## Financial Highlights

This report includes our pre-audited annual financial report. Major highlights of 2019 include:

- Balanced budget with surplus
- Operated with over **\$170,800 of in-kind services and donations**

Revenue (% of Total)	
Annual Campaign	51%
Special Events and Programs	30%
Sponsorships and Grants	9%
Camp	10%

Expenses (% of Total)	
Programs	60%
Personnel	29%
Infrastructure	11%

## 2019 ACCOMPLISHMENTS

The JCC-Federation of SLO enhanced our community in these new and engaging ways:

- **Relocation of Operations:** The JCC-Federation of SLO moved its operational headquarters inside Congregation Beth David to increase synergy, communication, and programming. This has especially been helpful with helping local community members with social services or Jewish resources. It also consolidates expenses for the Jewish community as a whole.
- **Central Coast Festival for Jewish Learning:** The JCC-Federation collaborated with Hillel of San Luis Obispo to host a unique, stimulating, and special festival featuring authors, philosophers and speakers for our community and campus.
- **Increased Social Media Focus:** Online presence matters and reaches thousands. Our 2019 Social Media Interns expanded our online reach by approximately 30%.
- **Social and Cultural Opportunities:** We were thrilled to be a top sponsor and welcome the internationally acclaimed musician, Joshua Bell, to San Luis Obispo, among other programs.
- **Community Grants Program:** 2019 was another year in awarding community Federation 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.
- **Jewish Family Services assistance:** Wider community awareness of our JFS micro-grants program increased in 2019, 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 and President's Council:** Continued efforts in 2019 focused on 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.
- **Sustainability Donors:** A campaign was launched to solicit 5-year donations of \$1000 or more to sustain the JCC-Federation's cost of doing business. The campaign was successful in securing \$30,000 for five years, and efforts are ongoing.

## 2020 INITIATIVES

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

- **JCC Manager:** 2020 will bring operational transitions to the organization, with the Executive Director shifting into a board role. The 2020 budget reflects a paid part-time position for a JCC Manager to sustain and support operations.
- **Central Coast Festival for Jewish Learning:** The JCC-Federation will collaborate with Hillel of San Luis Obispo to develop a return festival featuring authors, philosophers and speakers for our community and campus.
- **Property Usage and Development:** The JCC-Federation will continue hosting events at the property. A focused initiative implementing the updated Master Plan continues.

- **Jewish Community Fund:** Efforts to establish a community fund for sustainability of operations and staff started in 2019, and will continue into 2020 and the foreseeable future.

## Financial Statements

### STATEMENT OF FINANCIAL POSITION DECEMBER 2019 AND 2018

	<u>2019</u>	<u>2018</u>
Assets:		
Cash and cash equivalents	60,822 <sup>i</sup>	50,047
Fixed Assets (Land, buildings, and equipment):		
Land	220,000	220,000
Buildings	645,000	645,000 <sup>ii</sup>
Furniture and Equipment	1,796	718
Accumulated Depreciation	(243,941)	(243,941)
Acc Depreciation (Furn & Equip)	(2,844)	(1,979)
Intangible Assets	160	80
Total	619,850	619,877
Other Securities (tenant obligation)	174,700 <sup>iii</sup>	176,476
Total Assets	<u>855,373</u>	<u>846,400</u>
Liabilities and net assets:		
Short-term liabilities	0	0
Long-term debt (mortgage)	250,309	256,767
Total	250,309	256,767
Net Equity:		
Unrestricted Assets	579,635	579,635
Temporarily Restricted	10,882	6,093
Retained Earnings	3,904	(8,290) <sup>iv</sup>
Net Income	2,039	12,194
Total Equity:	591,672	589,632
<b>Total liabilities and net assets:</b>	<b>855,373</b>	<b>846,400</b>

<sup>i</sup> All figures are rounded to the nearest whole dollar amount.

<sup>ii</sup> Tenant invested in construction of a community room.

<sup>iii</sup> **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 2019, this amount is \$75,609.**

<sup>iv</sup> This was not an operational loss, it was 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, 2019

	<u>2019</u>	<u>2018</u>
Unrestricted revenues and gains:		
Contributions & Programs	109,446	117,516
Income from property, plant, and equipment	300	500 <sup>i</sup>
Other investment income	0	0
Tributes & Bequests	0	0
Total Unrestricted Revenues and gains:	109,747	118,017
Unrestricted expenses and losses:		
Management and general	31,080	31,668
Fundraising	4,921	5,113
Programming	52,771 <sup>ii</sup>	58,451
Expenses for property, plant and equipment <sup>iii</sup>	5,494	11,031
Total Unrestricted expenses and losses:	104,061	106,043
Gain (Loss) in temporarily restricted net assets:	0	0
Change in net assets	2,039	12,194
Net assets at beginning of year	601,529	589,335
Net assets at end of year	591,672	601,529

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

<sup>ii</sup> Significant reduction in property programming expenses

iii Includes depreciation expenses

## Leadership Circle and Sustainability Donors

The JCC-Federation of San Luis Obispo extends its gratitude to our contributors at all levels of support. We acknowledge our Leadership Circle and Sustainability donors for their exceptional level of giving. *Leadership Circle donations start at \$500. Names in **bold** indicate sustainability donors.*

Libbie Agran	Charles Fishman	<b>Mimi Naish &amp; Chris Toews</b>
<b>AJRWeb, Inc</b>	Joseph Fram & Bonnie Birch	Richard & Patti Namm
<b>Anonymous Donor</b>	<b>Arthur &amp; Cindy Fries</b>	Ellen & Leon November
Ron & Sandra Baers	Hildy Gal	Judith Propp
Judith & Ken Barclay	Hillel of San Luis Obispo	Esther & George Pudlo
<b>Lauren &amp; Armin Bandari</b>	Gail Gresham	Patti & Robbie Robbins
Jayne Behman	Victoria Grostick	Fred & Frieda Russell
John & Jody Belsher	<b>Brenda &amp; Jules Hock</b>	Irwin Joseph & Gail Schwartz
<b>Mary L. Bianco</b>	<b>Jake &amp; Wendy Kaufman</b>	<b>Susan Schneider &amp; Joel Siegel</b>
Martin Berry	Susie & Ben Lerner	Sandra & Isaac Shafran
<b>Carson and Natalie Britz</b>	<b>Margaret &amp; David Levine</b>	Steven Singer
Kate Bunnell	Luna Red	Robert & Sheila Spector
David & Kathy Canvasser	The Madonna Inn	Susan Stern-Pearl
City of San Luis Obispo	Jay Melnick & Lisa Marmon	Adrienne & Jim Shivers
<b>County of San Luis Obispo</b>	Diane & Pat McKeague	Dafna & Leo Tendrih
Vernanne Cohen	Rabbi Janice Mehring	Sharlot Sunshine
Julie & Richard Dorman	Liz Ruderman Miller	<b>Heidi &amp; Bob Turbow</b>
Epoch Wines	Susan Minker	Toews Law, Inc.
<b>Elisa Feingold</b>	The MOCA Foundation	Julia Valentine
<b>Bluma &amp; Edward Felix</b>		

## 2019 JCC-Federation Donors and Contributors

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

<i>Congregation Beth David</i>	Carson & Natalie Britz	Fred & Sophia Kelley
<i>Congregation Ohr Tzafon</i>	Central Coast Pediatrics	Freida Sumpter
<i>Temple Ner Shalom</i>	Charles Fishman	Gabriel & Kristen Telling
<i>Temple Beth El</i>	Corin & Hezi Koren	Gail Gresham
<i>Chabad of SLO/Cal Poly</i>	County of San Luis Obispo	Gail Kammermeyer
<i>Hillel of San Luis Obispo</i>	Courtney Mellblom	Gail Kniffen
A. Markoff	Dave & Kathy Canvasser	Gail Ryff
Adele Vernon	Daniel Weitz	Gail Schwartz & Irwin Joseph
Aimee Edsall	Debbie & Neal Moller	Gary & Marsha Epstein
Alissa Feldman	Debra Foster	Gordon Mullin
Art & Cindy Fries	Debra Glahn	Hal Sweasey
Amber Medina	Denise Barilla & Mark Sherman	Harold Ferguson
Amy Hart	Denise Leader Stoeber	Harvey & Evelyn Greenwald
Amy Hormann	Diana Heller	Heidi & Bob Turbow
Anne Lednicer	Diane & Pat McKeague	Helene Hamilton
Andrea Portney	Doreen Liberto Blanck	Hilary Phillips
Andres & Terry Schloss	Dwight McDonald	Howard Nicholson
Arlene Shinderman	Dr. Mark Sada & Elana Harway	Hugh Bream
Arlene Winn	Ed Reading	Ilan & Kelly Funke-Bilu
Art & Cindy Fries	Elaine & Rami Shani	Isaac & Sandra Shafran
Ben & Susie Lerner	Elisa Feingold	Isabel Kirsch
Benjamin Alexander	Elizabeth Ruderman Miller	Jake & Wendy Kaufman
Bernie & Bonnie Weiss	Ellen & Leon November	Jaime Hill
Betty Skatoff	Ellen Rosten	James (Jim) Warner
Binah & Rouvaishyana Polay	Ellen Sturtz	James Graff-Radford
Bluma & Edward Felix	Elisa Feingold	James Zerboni
Bob Wolf	Elizabeth Parker	Jamie Rich
Brenda & Julie Hock	Erin Helfman	Janet Kershaw-McLennan
Bruce Freeberg	Esther & George Pudlo	Janice & Jack Gelb
Carol Berger	Filip Yeskel	Janice Gelb
Carol Stern	Fred & Freida Russell	Jay Melnick & Lisa Marmon

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Jayne Behman	Loren Denker	Pierre LeJeune
Jayne & Steve Cohen	Lori Brier-Chavez	Rabbi Dov & Sharon Gottesfeld
Jennifer Bosserman	Lukas Amler	Rabbi Janice Mehring
Jennifer Jones	Marcia Alter	Rabbi Rachel Isaacs
Jerome & Rita Becker	Mark Getten	Ralph Levy
Jill Souza	Mark Magner	Rassaldo Desimone
Joan Bloomfield	Margaret & David Levine	Raymond Berger
Joan Meyers	Margot Forrest	Rebecca Suzanne Kallal
Joel I. Cehn	Marsha Steinfield	Richard & Patti Namm
Joel Siegel & Susan Schneider	Martin Berry	Richard Bernstein
Jordan & Manu Fiorentini	Martin Ricks	Robert & Fiona Reichek
Joseph & Bonnie Fram	Mary Browning	Robert & Joy Tuman
Joseph F Scalmanini	Mary L. Bianco	Robert & Sheila Spector
Joshua & Susie Walsh	Maxie & Gary Canant	Robin Schneider
Josue Medrano	McGinn Family Trust	Robyn Friedman O'Leary
Judy & Ken Barclay	Melissa & Daniel Lapidus	Rochelle Johnson
Judith Bernstein	Michael LeCover & Abby Lassen	Ron & Sandy Baers
Judith Harris	Michael Coyle	Rosa Britz
Karen Fabe	Michael Stanton	Rudy Xavier
Kate Bunnell	Michelle Call	Ruth Love
Kaylee Herring	Michelle Sook	Saeed & Shohreh Niku
Kelly Ann Lynch	Michelle Walker	Samadhy Coots
Ken & Gaby Levine	Mimi Naish & Chris Toews	Samantha Gaines
Kirstin Kallal	Mikayla Anderson	Sandra Brill
Korey Kolb	Mr. Jon-Erik G. Storm Esq.	Sarah McPhee
Kristin McNamara & Yishai	Murphy McFarland	Sarah Roldan
Horowitz	Myra Wapner	Sarah Yasutake
Lauren & Armin Bandari	Nancy Rosenberg	Sari Dworkin
Leah Press	Naomi Blakely	Scott Cleere
Leslie Moss	Nitsan Kolikant	Scott Currie
Leo & Dafna Tendrih	Patti & Robbie Robbins	Shannon & Raul Easton-Carr
Libbie Agran	Paul Pickering	Sharon & Michael Sindel
Linda Seeley	Paula Motlo	Sharlot Sunshine
Lisa Gleason	Peter Salcedo	Shirley Mednick
Lisa Jouet	Phyllis & Larry Caris	Shirley Stack & Bill Wagner
Lisa Mendoza	Phylissa Kwartner	Simone Levine



Stanley Gitler	Susan Shalit	Vernanne Cohen
Stephanie Carlotti	Susan Stern-Pearl	Victor & Yvonne Smith
Stephen Lakowske	Sylvia & Howard Drucker	Victoria Connerley
Stephen Hilty	Tali Freed	Victoria Grostick
Steve Balog	Tami Contreras	Virginia Kajikawa Baker
Steven Singer	Tammie J. Burnsed	William Alexander and Linda
Summer Gish	Tai Martin	Baker
Susan Aroner	Theresa Cullen	William John & Leslie Siembieda
Susan Dressler	Tom M. & Judy Freeman	Wendy Leigh Kim
Susan Minker	Torry Dickinson	Yael Got

## EXECUTIVE DIRECTOR MESSAGE

When I took on the leadership role ten 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 2019, 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.



Outgoing Executive Director, JCC-Federation of SLO

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## Staff and Board of Directors

**2020 Incoming Board:** Gail Schwartz (President), Lauren Bandari, Stephanie Carlotti (Secretary), Brenda Hock (Treasurer), Jake Kaufman, Liz Ruderman Miller, Mimi Naish, Richard Namm, Adrienne Shivers (past president), Susan Stern-Pearl

**Staff:** Bobby Naimark, JCC Manager in Training / Julia Valentine, Camp and Property Director  
Ilene Brill, Intake Coordinator, Jewish Family Services / Rosa Britz and Stephanie Carlotti, Office Administrators

### 2019 Award Recipients and Acknowledgements:

Martin L Meltz Volunteer of the Year - Gail Gresham  
Executive Director Outstanding Service Award - Adrienne Shivers

### Agency Information

Operations - 10180 Los Osos Valley Rd, San Luis Obispo, CA 93405  
Grounds - 875 Laureate Lane, San Luis Obispo, CA 93405  
Tel: 805-426-5465      Email: [info@jccslo.com](mailto:info@jccslo.com)      [www.jccslo.com](http://www.jccslo.com)