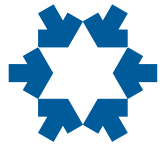


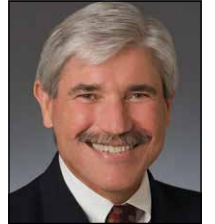
**Greater Miami  
Jewish Federation**  
2015-2016 Report to the Community

JewishMiami.org  
4200 Biscayne Boulevard  
Miami, FL 33137  
305.576.4000



## Greater Miami Jewish Federation

**The Mission of the Greater Miami Jewish Federation is to mobilize human and financial resources to care for those in need, strengthen Jewish life and advance the unity, values and shared purpose of the Jewish people in Miami, in Israel and around the world.**



**F**or nearly eight decades, the Greater Miami Jewish Federation has brought together generous donors and volunteers to:

- Provide a safety net for the vulnerable
- Educate and enhance Jewish identity
- Build, secure and sustain our community
- Welcome immigrants to Israel and assist Jewish Israelis in need
- Safeguard and enrich Jewish life worldwide

Whether your financial support comes through the Annual Federation/UJA Campaign, a supplemental donation, a charitable fund through The Foundation of the Greater Miami Jewish Federation, or a commitment to Create a Jewish Legacy (CJL), your contribution is meaningful and important.

It demonstrates your dedication to the Federation Mission and the Jewish value that “All Jews are responsible for one another,” and it joins with thousands of other donations to provide for today’s needs – and our shared Jewish future.

You can see the impact of your donation in this *2015-2016 Report to the Community*. On behalf of all you are helping through your generosity and partnership, we sincerely thank you.

**Amy N. Dean**  
Chair of the Board

**Jacob Solomon**  
President and Chief Executive Officer



# 2015-2016 SUMMARY OF INCOME & ALLOCATIONS

Each year, the Greater Miami Jewish Federation partners with thousands of generous donors and dedicated volunteers to meet the needs of our local and overseas Jewish family, to address issues that affect us as a people, to quickly adapt to changing needs and to plan for the future. To fulfill all of these functions, Federation's fundraising, community organization services and administrative costs for our Jewish community have averaged 13 percent during the past six years.

## \$63 million+

raised from all sources, including nearly \$23 million from the Annual Federation/UJA Campaign, as well as funds provided through supplemental giving, grants and the activities of The Foundation of the Greater Miami Jewish Federation.

## 87¢

of every dollar goes directly to support priority programs and services (six-year average).



For audited report and IRS Form 990, please visit JewishMiami.org.

The Foundation Contributions and Bequests  
**43% | \$27,482,000**

Annual Campaign  
**36% | \$22,965,000**

The Foundation Charitable Trusts and Donor-Designated Funds  
**11% | \$6,844,000**

Net Realized and Unrealized Investment Gains  
**5% | \$3,281,000**

Supplemental Giving  
**2% | \$1,312,000**

United Way of Miami-Dade County  
**1% | \$823,137**

Program Fees, Government Grants, Rental and Other Income  
**< 1% | \$498,000**

The Foundation Campaign Endowment Funds  
**< 1% | \$243,000**

Due to rounding, the percentages may not sum to 100%.

## Allocations and Expenses

Local Agencies and Services	\$12,775,198
Foundation Grants to Agencies and Annual Campaign	19,825,616
Grants from Supplemental Giving	1,312,000
Overseas and National Agencies and Services	8,068,817
Total Financial Resource Development Expenses	6,356,318
Reserve for Losses on Collections	861,188
Change in Restricted and Unrestricted Funds	14,249,000
<b>Total Allocations and Expenses</b>	<b>\$63,448,137</b>

## 4-star

rating — the highest possible — awarded to Federation again in 2015 from Charity Navigator, America's largest independent evaluator of charities.



## LOCAL PROGRAMS AND AGENCIES

### Jewish Education

Center for the Advancement of Jewish Education (CAJE)	\$1,179,328
Day Schools	
Day School Enhancement Grants	130,000
Day School Hardship Scholarships	150,000
Beth David/Gordon Day School	34,874
Hebrew Academy (RASG)	203,612
Hochberg Preparatory: A Solomon Schechter Day School at Beth Torah	
Benny Rok Campus	80,192
Jacobson Sinai Academy	88,729
Kesher L.D.	153,687
Lehrman Community Day School	94,087
Mechina of South Florida High School	44,500
Scheck Hillel Community School	393,330
Shaarei Bina-Torah Academy for Girls	44,955
Temple Beth Am Day School	79,556
Yeshiva Elementary School	141,820
Yeshiva Toras Chaim/Toras Emes Academy of Miami	265,368
Holocaust Documentation and Education Center	15,000
Holocaust Memorial Miami Beach	50,000
Holocaust Memorial - Targeted Grants	50,000
Jewish Museum of Florida-FIU	20,000
Sue & Leonard Miller Center for Contemporary Judaic Studies at the University of Miami	31,345
Synagogue School Supplemental Scholarship Program	86,627
Teacher Fringe Benefits Program	255,000
<b>Total</b>	<b>\$3,592,010</b>

### Jewish Identity

Alexander Muss High School in Israel	\$145,645
BBYO	61,440
Dave and Mary Alper Jewish Community Center (Alper JCC) on The Jay Morton-Levinthal Campus	933,746
Galbut Family Miami Beach Jewish Community Center (Miami Beach JCC) on the Simkins Family Campus	371,500
High Holiday Welcome Program of the Greater Miami Jewish Federation	100,000
Florida Hillels (Central Florida Hillel, Hillel at FIU, Hillel at FSU, Hillel of Broward and Palm Beach, Hillels of the Florida Suncoast, UF Hillel, UM Hillel)	437,755
Israel Programs Scholarships	60,000
Michael-Ann Russell Jewish Community Center (MARJCC) on the Sanford L. Ziff Campus	922,064
Moishe House Miami	40,000
Onward Israel	31,875
Overnight Camp Scholarships	100,000
PJ Library	120,000
Taglit-Birthright Israel	211,526
<b>Total</b>	<b>\$3,535,551</b>

### Social, Health and Human Services

Association for Jewish Special Education	\$1,000
Hebrew Free Loan Association of South Florida	47,105
Holocaust Survivors Program	145,750
Jewish Adoption and Foster Care Options (JAFCO)	20,000
Jewish Community Services of South Florida (JCS)	2,071,216
Jewish Volunteer Center of the Greater Miami Jewish Federation	57,000
JWorks Miami	80,000
Miami Jewish Health Systems	95,234
Mishkan Miami: The Jewish Connection for Spiritual Support	200,000
Mount Sinai Medical Center	42,420
<b>Total</b>	<b>\$2,759,725</b>

### Jewish Incubator Grants

Beth David Congregation	\$5,400
Beth Torah Benny Rok Campus	3,600
Chabad Chayil	3,600
Friendship Circle - Miami	7,000
Friendship Circle - Miami Beach/North Dade	5,400
Galbut Family Miami Beach Jewish Community Center (Miami Beach JCC) on the Simkins Family Campus	10,000
Helping Hands Kosher Food Ko-Op	7,000
Hochberg Preparatory: A Solomon Schechter Day School at Beth Torah Benny Rok Campus	2,500
Jewish Community Services of South Florida (JCS)	7,200
Kesher	3,400
K Space Miami	6,550
Limmud Miami	9,000
NCSY	10,000
Talmudic University	3,600
Beit David Highland Lakes Shul	2,500
The Tribe	8,000
Yachad	2,500
Yehudi	2,750
<b>Total</b>	<b>\$100,000</b>

### Women's Impact Initiative Grants

Aventura Turnberry Jewish Center	\$3,700
Chai Lifeline	4,300
Galbut Family Miami Beach Jewish Community Center (Miami Beach JCC) on the Simkins Family Campus	5,300
Hadassah Greater Miami	2,500
Hebrew Academy (RASG)	4,000
Jewish Community Services of South Florida (JCS)	10,600
NCSY	5,700
Scheck Hillel Community School	4,500
Sharsheret	5,000
University of Miami Hillel	4,400
<b>Total</b>	<b>\$50,000</b>

### Community Organization and Central Services

Agency Executives Retirement Plan	\$52,000
Audit and Accounting Fees for Local Agencies	187,130
Building Services	247,783
Contingency Reserve	100,000
Demographic Study	25,000
Greater Miami Jewish Federation Community Services, Planning & Allocations, Administration, Human Resources Development, Outreach Services, etc.	1,621,138
Jewish Community Relations Council of the Greater Miami Jewish Federation	276,002
Organization for Leadership Advancement in Miami of the Greater Miami Jewish Federation	57,372
Reserve for Future Allocations	171,487
<b>Total</b>	<b>\$2,737,912</b>

**Total for All Local Agencies and Services \$12,775,198**

## NATIONAL PROGRAMS AND SERVICES

American Jewish Committee	\$3,000
Anti-Defamation League	3,000
CIAL - The National Jewish Center for Learning and Leadership	1,500
Foundation for Jewish Camp	1,500
Hebrew Union College School of Jewish Communal Service	1,500
Hornstein Jewish Professional Leadership Program at Brandeis University	1,500
Jewish Educational Loan Fund (JELF)	3,000
Jewish Labor Committee	1,000
Jewish War Veterans of the USA	1,000
JPRO Network	2,000
National Federation/Agency Alliance	233,700
American Jewish World Service	
Association of Jewish Family and Children's Agencies	
BBYO	
HIAS	
Hillel International	
Jewish Community Centers Association of North America	
Jewish Council for Public Affairs	
Jewish Telegraphic Agency	
NCSEJ: National Coalition Supporting Eurasian Jewry	
Orthodox Union	1,000
Project Interchange, an Institute of the American Jewish Committee	2,000
Union for Reform Judaism	1,000
United Synagogue for Conservative Judaism	1,000
Wurzweiler School of Social Work at Yeshiva University	1,500
<b>Total</b>	<b>\$259,200</b>

## ISRAEL AND OVERSEAS PROGRAMS AND SERVICES

The Jewish Federations of North America	\$5,804,452
American Jewish Joint Distribution Committee, Israel Action Network, The Jewish Agency for Israel, The Jewish Federations of North America and World ORT	
Argentina Welfare & Relief	21,509
Beit Issie Shapiro	62,000
Beit Singer	100,000
Elderly Welfare in the Former Soviet Union	252,000
Ethiopian-Israeli Initiatives in Pardes Channa-Karkur	222,192
Food Insecurity Amutot	60,000
Fund for the Victims of Terror	50,000
Israel and Overseas Department	250,052
Israel Trauma Coalition	10,000
Masa Israel Journey	60,000
Negev Funding Coalition	25,000
Or Akiva Futernick Family Child Development Center	20,000
Partnership Initiative in the Israeli City of Yerucham	420,500
Religious Amutot	40,000
Women's Amutot Initiative	294,912
Yad Sarah	100,000
<b>Total</b>	<b>\$7,792,617</b>

## OTHER ALLOCATIONS AND EXPENDITURES

Cost of Fundraising and Collections	\$4,755,413
Florida Association of Jewish Federations	17,000
<b>Total</b>	<b>\$4,772,413</b>

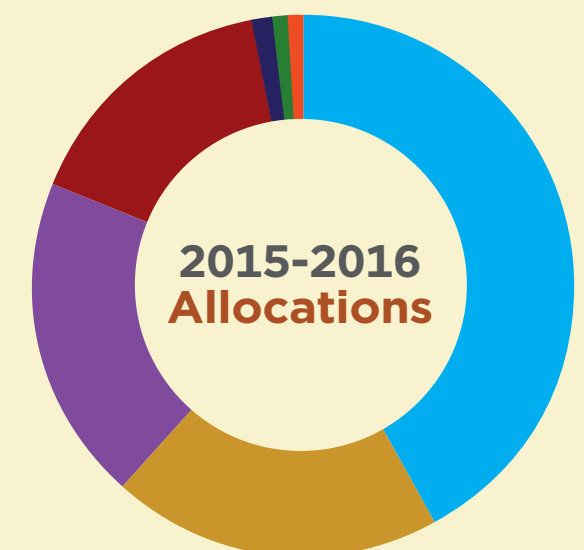
**Total for All Allocations \$25,599,428**

## SOURCES OF AVAILABLE FUNDS

Annual Greater Miami Jewish Federation/UJA Campaign	\$22,965,000
(Less: Reserve for Losses on Collections @ 3.75%)	(861,188)
Designated Program Grants	1,135,191
United Way of Miami-Dade County*	823,137
Carryover Surplus	405,544
The Foundation of the Greater Miami Jewish Federation**	1,131,744
<b>Total Available Funds</b>	<b>\$25,599,428</b>

\* Federation gratefully received an annual allocation from United Way of Miami-Dade County in support of three beneficiary agencies: Alper JCC, JCS, MARJCC.

\*\* The Foundation of the Greater Miami Jewish Federation received a grant from the Harry and Jeanette Weinberg Foundation in support of Jewish Federation Housing, Inc., which operates the Harry and Jeanette Weinberg Federation Towers and Gardens.



Israel and Overseas Programs and Services  
**43%**

Jewish Education  
**20%**

Jewish Identity  
**20%**

Social, Health & Human Services  
**15%**

National Programs and Services  
**1%**

Jewish Incubator Grants  
**< 1%**

Women's Impact Initiative Grants  
**< 1%**

Due to rounding, the percentages may not sum to 100%.

# A GIFT FOR FEDERATION, FOR MIAMI'S JEWISH COMMUNITY, FOR ISRAEL, FOR THE FUTURE.

For more than half a century, The Foundation of the Greater Miami Jewish Federation has enabled countless philanthropic individuals and families to support vital services in Miami, in Israel and around the world through meaningful, strategic and tax-wise planned and legacy gifts.

At year's end, The Foundation held **\$262.9 million in 689 individual endowment and philanthropic funds, charitable funds and life insurance endowments**. This is an **increase of 7 percent** since 2014.

During 2015, Foundation donors contributed **\$2.8 million** to establish **28 new funds** and **\$36.8 million** more to increase the value of existing funds.

**Grants** valued at **\$19.2 million** were awarded to Federation, our **beneficiary agencies** and other charities during 2015.

The **Jewish Community Trust Fund** is Federation's **unrestricted endowment**. It is a collection of unrestricted bequests, large and small, received over the last 50 years from donors seeking to enhance our collective Jewish future. In 2015, the Jewish Community Trust Fund made a **\$2.7 million unrestricted grant** for Federation-supported programs and services.

**Campaign Endowment Funds** are **permanent endowments** designated by donors to perpetuate an annual gift to the Federation/UJA Campaign. They provide support in the name of the donor, or a loved

one, to help Federation continue to meet the needs of our community, locally and globally, for generations to come. In 2015, The Foundation's **Campaign Endowment Fund and other Funds designated** for the campaign made grants to the Federation/UJA Campaign totaling **\$2.6 million**.

A **Donor-Advised Fund** or **Philanthropic Fund** is a "charitable checking account" a donor can establish with even a modest amount of money. These funds allow donors to realize important **tax advantages** and make **charitable contributions** when the time is right for them.

A **Supporting Foundation** is a means by which donors can involve family members in their philanthropy.

It is a separate corporate entity with most of the advantages of a Donor-Advised Fund and few of the disadvantages of a private foundation. It allows donors to make **charitable contributions** and realize important **tax advantages** on a larger scale.

The Greater Miami Jewish Federation received **153 grants** from **Foundation Donor-Advised Funds** and **Supporting Foundations** valued at **\$2.4 million**. A total of **652** other qualified charitable organizations — Jewish and non-Jewish — in Miami and elsewhere, received an additional **\$14.3 million**.

**294**

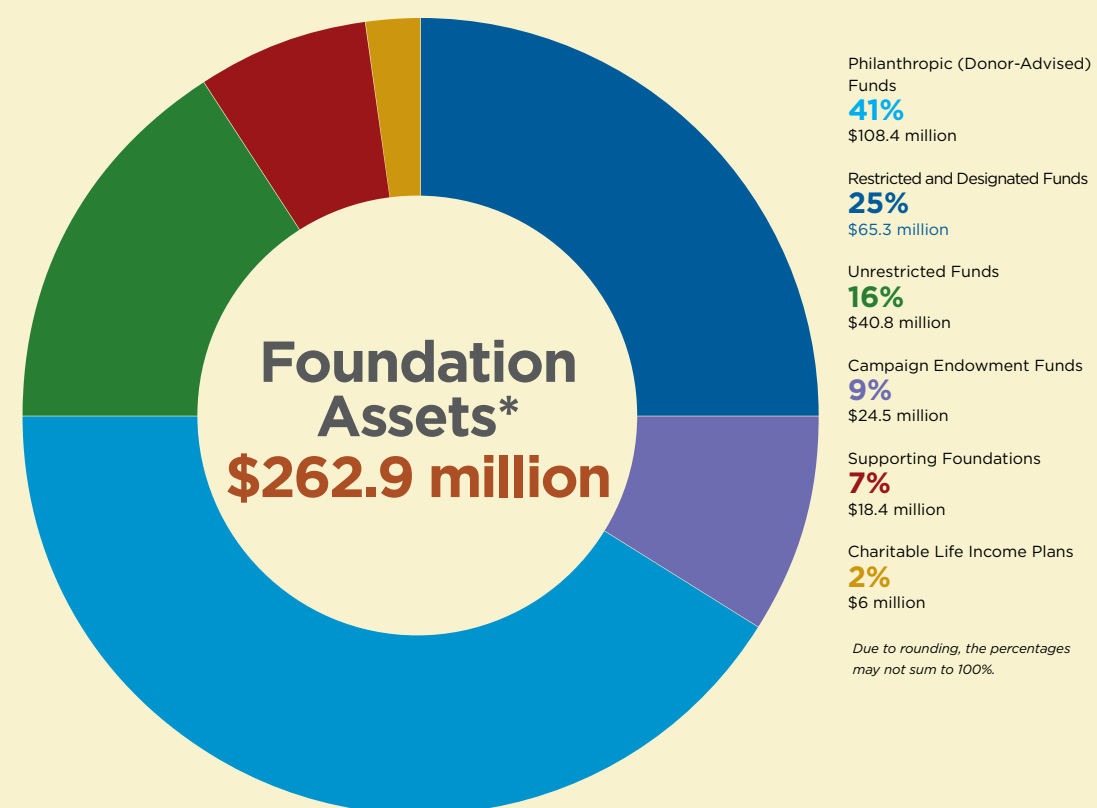
**allocations valued at \$3.1 million** to Federation's local and overseas partner agencies

**529**

**allocations to non-Jewish organizations** in Miami, throughout Florida, and across the U.S. **valued at \$4.9 million**

**825**

**allocations valued at \$6.2 million** to other Jewish programs and services in Miami, in Israel and around the world



\*As of 12/31/15



Create a Jewish Legacy (CJL), the collaborative endowment program benefitting Miami's Jewish agencies, synagogues, day schools and The Foundation of the Greater Miami Jewish Federation, has been working in successful partnership with local organizations for four years.

As of December 31, 2015, **589 individuals and families** have signed declarations of intent valued at an estimated **\$39.8 million** in expectancies.

**\$23.2 million**

in **Jewish Community Trust Fund** assets

**\$24.5 million**

in **Campaign Endowment Funds** assets

**225**

**Donor-Advised Funds** through The Foundation with **\$108.4 million** in assets

**23**

**Supporting Foundations** through Federation with **\$18.4 million** in assets

**356**

grants totaling **\$1.9 million** approved in 2015



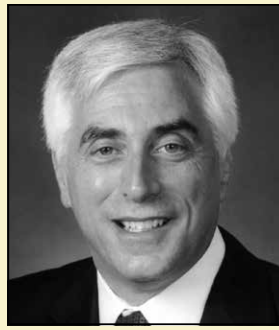
## 2016-2017 OFFICERS



**Amy N. Dean**  
Chair of the Board



**Robert G. Berrin**  
Immediate Past Chair



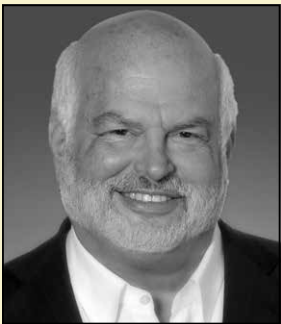
**Paul Berkowitz**  
Vice Chair and  
Administrative  
Committee Chair



**Mojdeh Khaghan Danial**  
Vice Chair and  
Planning and Distribution  
Committee Chair



**Michelle S. Diener**  
Vice Chair



**Isaac K. Fisher**  
Vice Chair



**Steven Gretenstein**  
Vice Chair and  
Financial Management  
Committee Chair



**Laura P. Koffsky**  
Vice Chair and  
Israel and Overseas  
Committee Chair



**Sidney M. Pertnoy**  
Vice Chair



**Sheree Savar**  
Vice Chair and  
Women's Philanthropy  
President



**Jeffrey Scheck**  
Vice Chair and  
General Campaign  
Chair



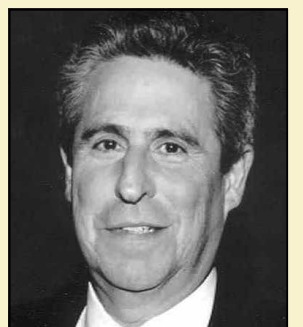
**Lily Serviansky**  
Vice Chair and The  
Foundation of the Greater  
Miami Jewish Federation  
Chair



**Hedy K. Whitebook**  
Vice Chair



**Ray Ellen Yarkin**  
Vice Chair



**Richard Yulman**  
Vice Chair



**Robin Jacobs**  
Secretary



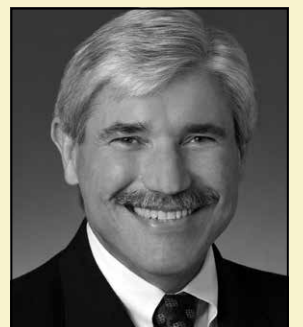
**Jacob Serfati**  
Associate Secretary



**Elise Scheck Bonwitt**  
Treasurer



**Matthew L. Adler**  
Associate Treasurer



**Jacob Solomon**  
President and Chief  
Executive Officer

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Daniel Ades  
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Gail Meyers  
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Michael Rudd  
Shana Lewinger Russo  
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Elise Udelson  
Michael S. Wagner  
Scott Wagner  
Steven Wagner  
Debra Braman Wechsler  
Stanley Weinstein  
Robert I. Werner  
Norma Kipnis Wilson \*  
Jorge Woldenberg  
Andrew Wolf  
Howard Wolofsky  
Gary Yarus  
Isaac Zelcer \*\*  
Regina F. Zelonker  
Rabbi Yochanan Zweig

\* Life Member  
♦ Federation Past President  
or Past Board Chair

## 2016-2017 STANDING COMMITTEES

### Administrative

Paul Berkowitz

### Agency Support

Edward Beiner  
Amy Berger Chafetz

### Audit

John Sumberg

### Building Operations

Steven Hurwitz

### Bylaws and Governance

Rep. Elaine Bloom

### Campaign Cabinet

Jeffrey Scheck

### Executive Evaluation and Compensation

Amy N. Dean

### Federation/Synagogue Relations

Rabbi Jonathan Berkun  
Robert Hertzberg

### Financial Management

Steven Gretenstein

### The Foundation of the Greater Miami Jewish Federation

Lily Serviansky

### Holocaust Memorial Miami Beach

Andrew C. Hall

### Human Resource Development

Regina F. Zelonker

### Investment

John M. Bussel

### Israel and Overseas

Laura P. Koffsky

### Israel Programs

Diane Lipson Schilit

### Jewish Community Relations Council

Shelley Niceley Groff

### Jewish Volunteer Center

Tobi Ash

### Marketing and Communications

Janice Lipton

### Miami Beach Branch Board

Mytyl Simancas-Bister

### Mishkan Miami of the Greater Miami Jewish Federation

Joy Spill

### Nominating

Brian L. Bilzin

### North Dade/Aventura Branch Board

Lourdes Gabriela Suarez

### Philanthropic Initiatives

Barbara Black Goldfarb

### Planning and Distribution

Mojdeh Khaghan Danial

### Pledge Redemption

Barry T. Gurland

### South Dade Branch Board

Ryan Bailine

### The Network

Larry Bassuk  
Michael S. Wagner

### Women's Philanthropy Board

Sheree Savar

## SENIOR MANAGEMENT TEAM

### Jacob Solomon

President and  
Chief Executive Officer  
786.866.8600  
jsolomon@gmjf.org  
.....

### Myron J. "Mike" Brodie

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Emeritus  
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### Michelle Labgold

Chief Planning Officer  
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### Jeffrey Y. Levin

Chief Development Officer  
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### Bonnie Reiter-Lehrer

Chief Marketing and  
Communications Officer  
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### Oksana Cardini

Chief Financial Officer  
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ocardini@gmjf.org

