

JEWISH COMMUNAL FUND

2017

GIVING REPORT





About Jewish Communal Fund

Jewish Communal Fund (JCF) is the largest and most active network of Jewish funders. JCF facilitates philanthropy for nearly 9,000 people associated with 3,500 funds, totaling \$1.5 billion in charitable assets. In FY 2017, our generous fundholders granted out \$397 million—26% of our assets—to charities in all sectors.

The impact of JCF's network of funders on the Jewish community and beyond is profound. In addition to an annual unrestricted grant to UJA-Federation of New York, JCF's Special Gifts Fund (our endowment) has granted more than \$13 million since 1999 to support programs in the Jewish community at home and abroad, including kosher food pantries and soup kitchens, day camp scholarships for children from low-income homes, and the creation of a sensory gym at a local JCC to serve children with special needs. These charities are selected with the assistance of UJA-Federation of NY.

To learn more about JCF, visit jcfny.org or call us at (212) 752-8277.

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As the leading collective of Jewish funders, Jewish Communal Fund has an important story to tell. It's a story about generosity, and a deep commitment to the charitable causes we hold dear.

A story about multi-generational giving, with many third-generation JCF fundholders showcasing the passion for philanthropy that they learned from their parents and grandparents before them.

And, most importantly, a story about how when people come together to give through a Jewish organization, we all accomplish more.

In this inaugural Giving Report, we provide data and research that captures giving trends within the Jewish community as seen from one of the longest-serving donor advised funds in the country. Now entering its 46th year, JCF has played a critical role in facilitating charitable giving for a wide spectrum of Jewish philanthropists of varying means, interests and religious affiliations.

Here are some statistics that shed light on the uniqueness that is the JCF funder community:

- JCF fundholders make an average of 15 grants per fund per year, with a median grant amount of \$600.
- JCF fundholders distributed 26% of charitable assets, as a collective, in 2017.
- 10% of funds distributed 50% or more of the balance in their funds to charities in FY 17.
- The sectors that received the largest number of dollars from JCF fundholders in FY 17 were education, Israel, and community organizations.
- Our fundholders made 35,170 grants (67% of all grants) to Jewish organizations, totaling nearly \$170 million.
- Our fundholders granted \$22 million to UJA-Federation of NY in 2017, in addition to JCF's \$2 million annual gift to UJA.
- Most JCF fundholders (60%) contribute to their donor advised funds on an annual basis, or more frequently.
- Jewish Communal Fund announced \$1.35 million in Special Gifts Fund grants in 2017.

We invite you to delve into this report and learn more about the JCF philanthropic community, charitable giving trends, and the ways in which JCF fundholders are collectively making our community and the world a better place.

Who are JCF's Fundholders?

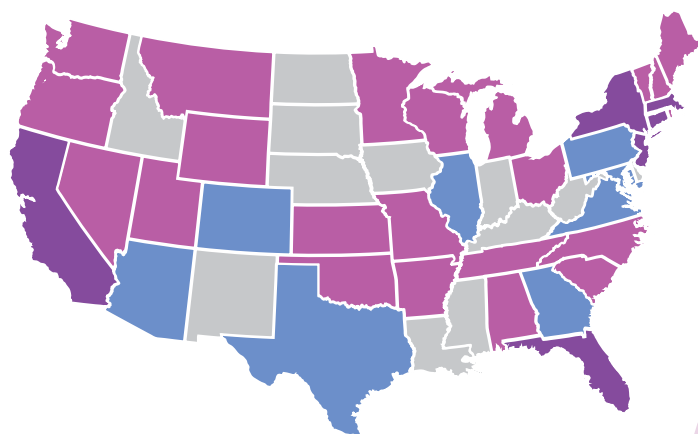


Jewish Communal Fund is the largest and most active network of Jewish philanthropists in the country. Nearly 9,000 people are associated with 3,500 donor advised funds: Fundholders oversee the account, Recommenders make grants during the Fundholder's lifetime, and Interested Parties are assistants, accountants, attorneys, and wealth managers appointed by Fundholders to help them manage their accounts. JCF's charitable funds allow for unlimited succession, and we are proud to facilitate charitable giving for the third generation of many philanthropic families.



JCF enables fundholders to engage their families and advisors in their philanthropic journey.

Geographic Location of our Fundholders



NEW YORK • 3,277
 NEW JERSEY • 619
 FLORIDA • 226
 CONNECTICUT • 159
 CALIFORNIA • 140
 MASSACHUSETTS • 68

ISRAEL • 68
 ■ 6-50
 ■ 10 or less
 ■ No donors



► Manhattan 1,642
 ► Westchester 568
 ► Nassau County 383
 ► Brooklyn 331
 ► Bronx 99
 ► Queens 92
 ► Rockland County 75
 ► Suffolk County 45
 ► Staten Island 13

AVERAGE AGE AT
OPENING A FUND

44

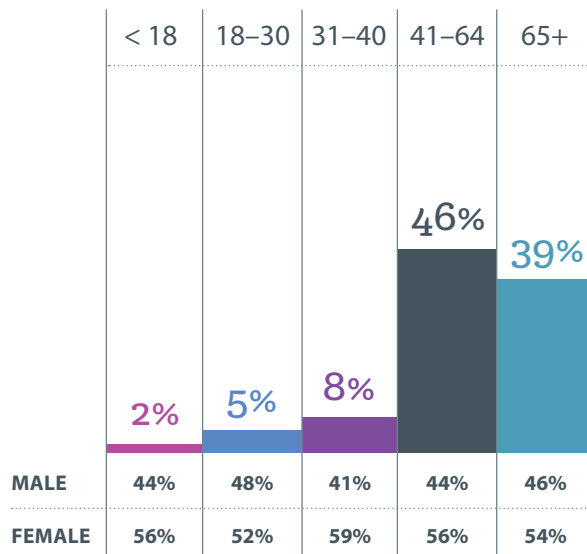
CURRENT AVERAGE
FUNDHOLDER AGE

55

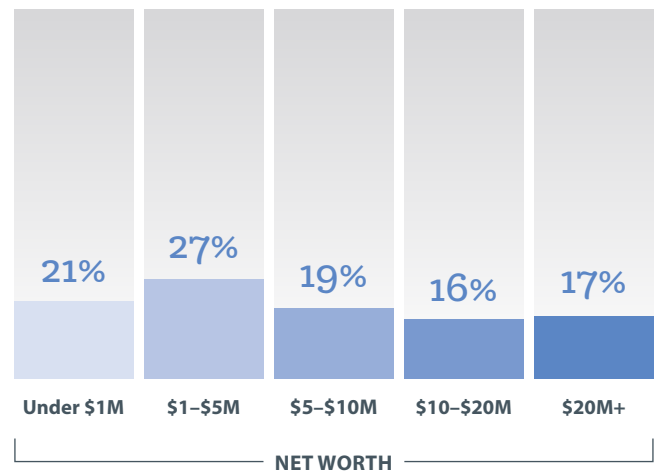


When determining whether to open a fund at JCF, **JCF's reputation**, **level of service**, and **affiliation with the Jewish community** were the top three factors that led them to open a fund at JCF.

Fundholders' Ages

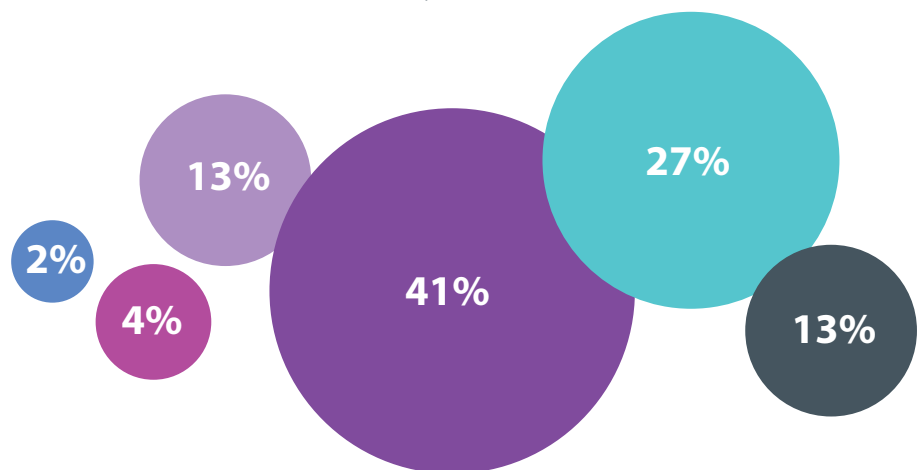


Half of JCF survey respondents* have a net worth of **\$5 million** or more.



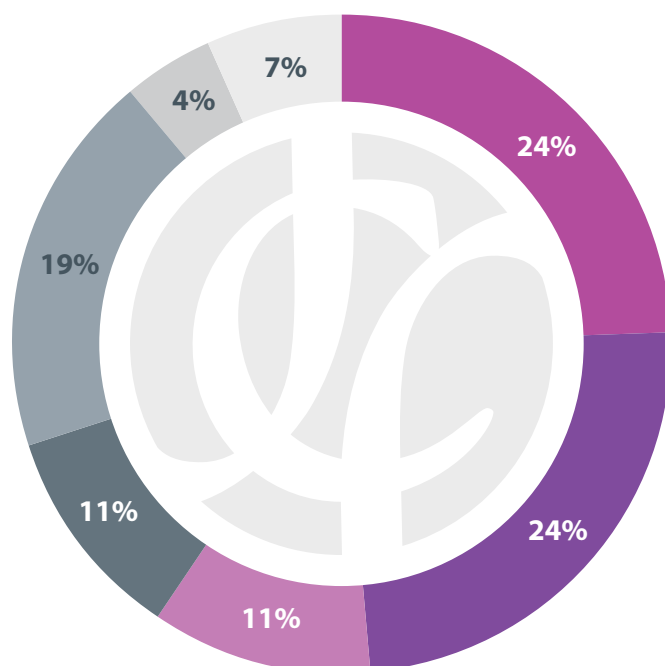
Most JCF Fundholders (60%) contribute to their funds on an annual basis, or more frequently.

- More than once per month
- Once per month
- Every 6 months
- Every year
- Every 2+ years
- Not since my fund opened

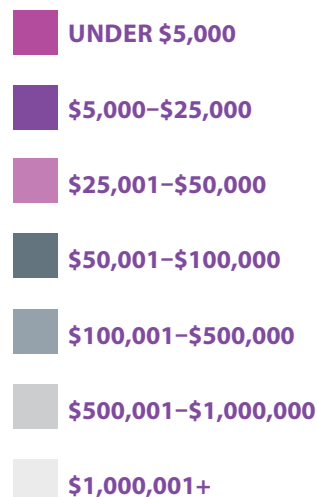


*The results of an independent survey conducted by Wellspring Consulting on behalf of JCF, administered in July 2017.

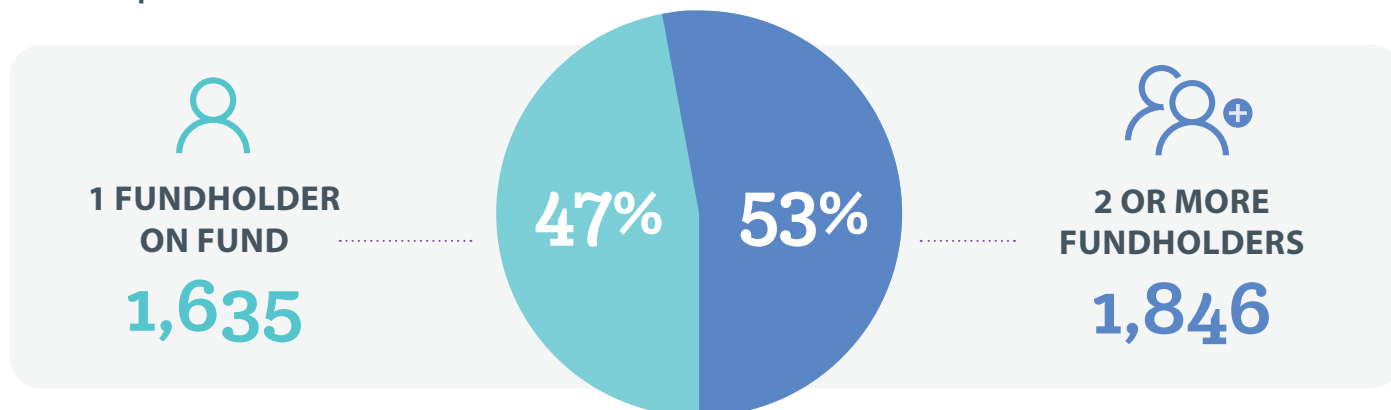
Breakdown of JCF Funds by Balance



Percentage of JCF funds by balance:



Participants on a JCF fund



NUMBER OF FUNDS
3,500

CHARITABLE ASSETS UNDER MANAGEMENT
\$1.5 BILLION

MEDIAN ACCOUNT BALANCE
\$26,475

JCF's Fundholders' Generosity

JCF fundholders are active grant-makers; they make an average of 15 grants each year per fund.

As a collective, JCF fundholders granted out **26%** of assets to charitable causes in FY 2017.



8,764

CHARITIES SUPPORTED
IN 2017



15

AVERAGE NUMBER OF GRANTS
PER FUND PER YEAR

Average Grant Amount

\$7,572



\$7,617

THREE-YEAR AVERAGE

Median Grant Amount

\$601



\$667

THREE-YEAR AVERAGE

JCF distributed a record number of grants—52,402—in 2017.

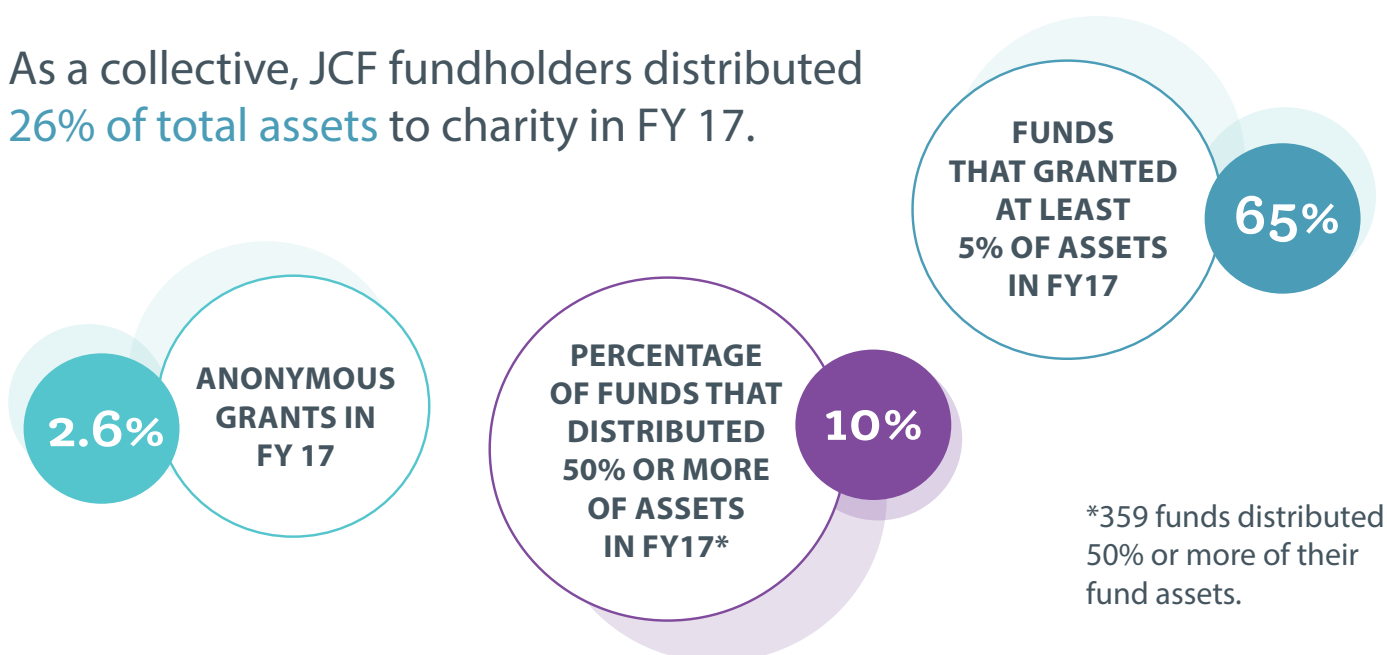


44,289

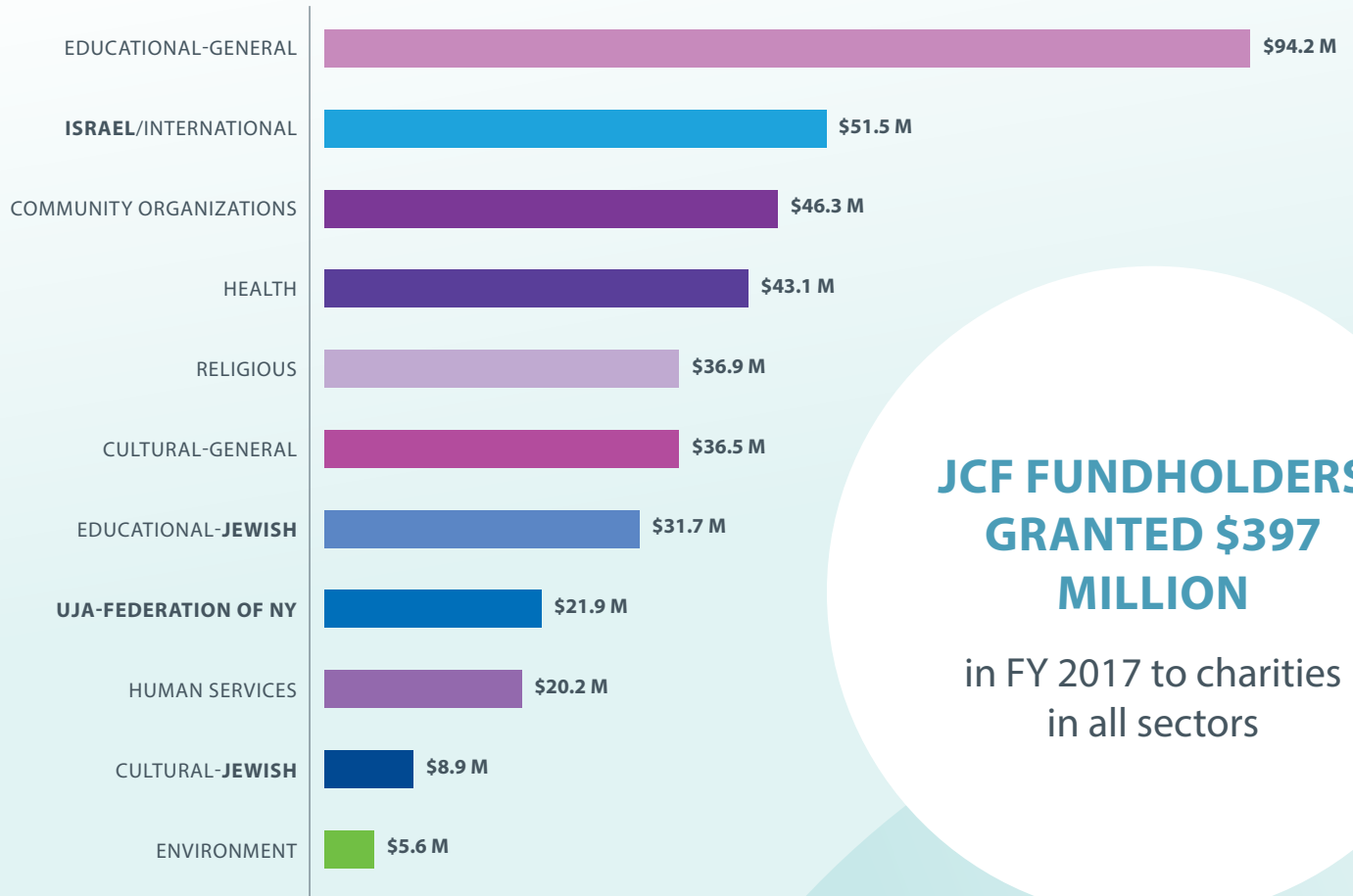
GRANTS RECOMMENDED ONLINE

8,113 recommended by fax/mail

As a collective, JCF fundholders distributed 26% of total assets to charity in FY 17.



Which causes do JCF Fundholders support?



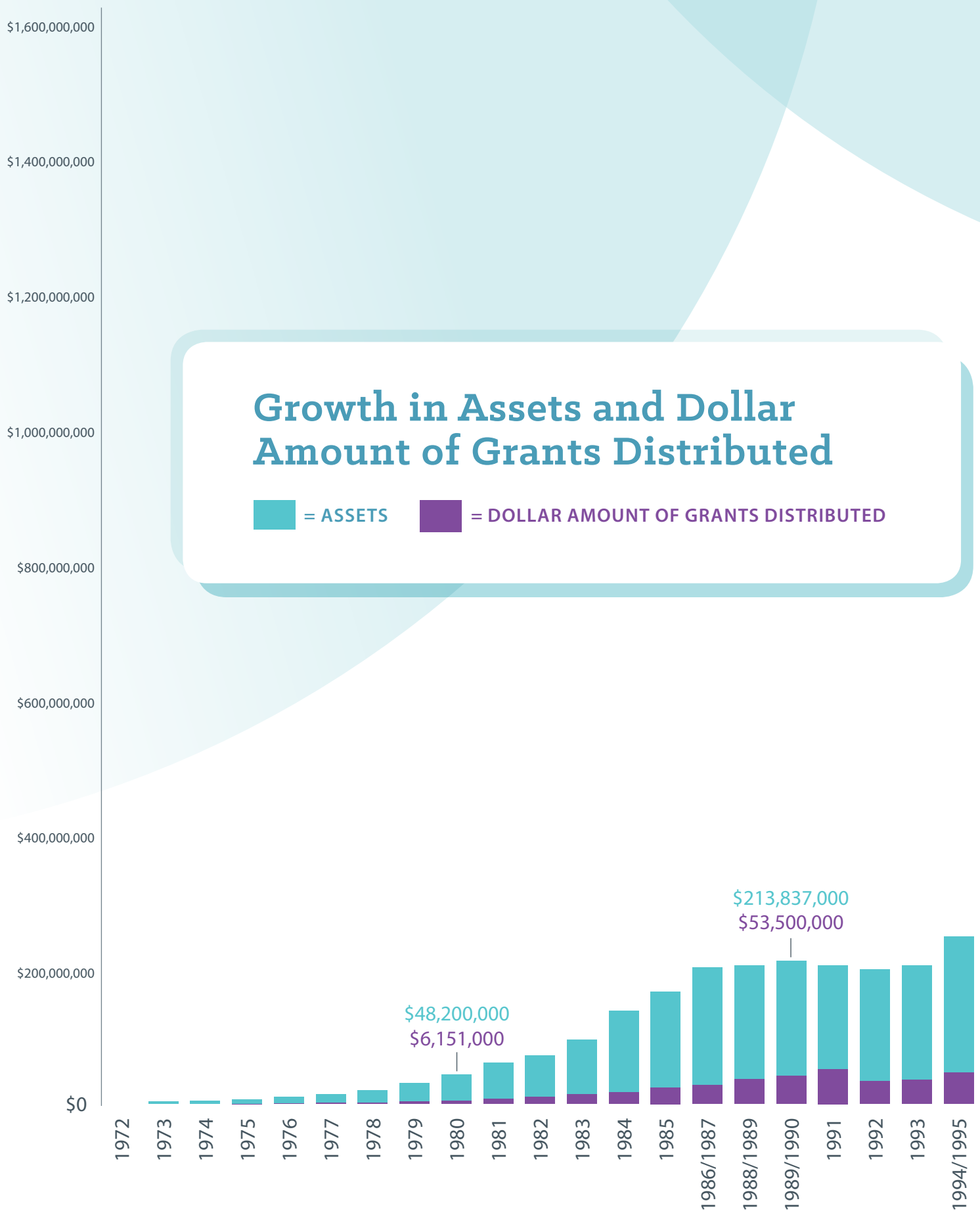
What does the Human Services category include?

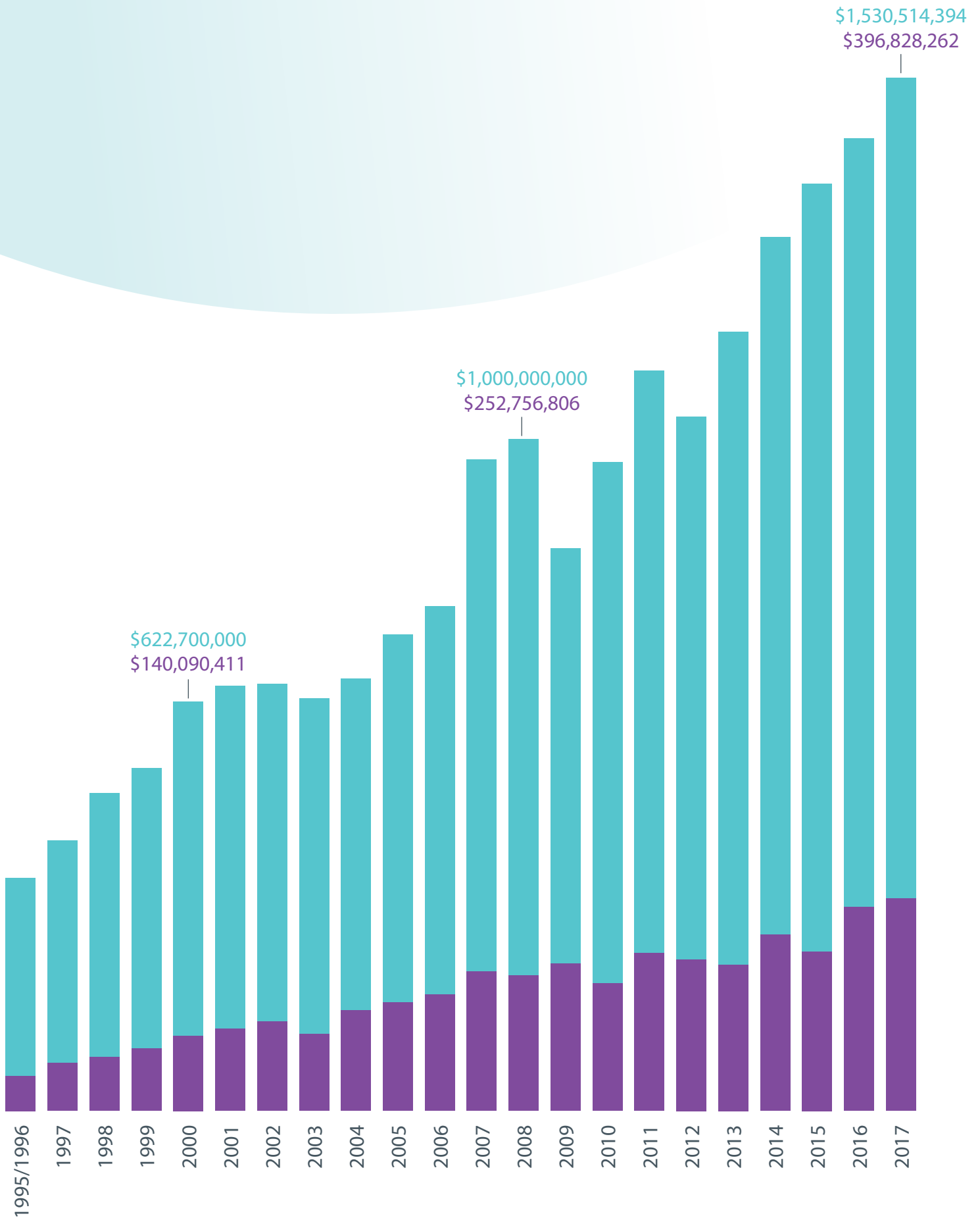
Human Services charities provide direct services to people in need—they feed the hungry, shelter the homeless, and care for the young and elderly.

What are Community Organizations?

The Community Organization category includes community centers like JCCs, recreation and sports, inter-religious and inter-racial organizations, libraries and other organizations that benefit the public.

Grants





JCF Fundholders' Top Charities in FY 17

(as measured by number and dollar amount of grants)



COMMUNITY ORGANIZATIONS

Top two charities in terms of # of Grants

- ▶ UJA-Federation of New York
- ▶ Sephardic Community Youth Center

Top two charities in terms of Dollar Amounts

- ▶ UJA-Federation of New York
- ▶ Robin Hood Foundation



CULTURE-GENERAL

Top two charities in terms of # of Grants

- ▶ New York Public Radio
- ▶ WNET

Top two charities in terms of Dollar Amounts

- ▶ Museum of Modern Art
- ▶ Metropolitan Museum of Art



CULTURE-JEWISH

Top two charities in terms of # of Grants

- ▶ United States Holocaust Memorial Museum
- ▶ Hillel: The Foundation for Jewish Campus Life

Top two charities in terms of Dollar Amounts

- ▶ Hillel: The Foundation for Jewish Campus Life
- ▶ The Jewish Museum



EDUCATION-GENERAL

Top two charities in terms of # of Grants

- ▶ The Trustees of Columbia University in the City of New York
- ▶ New York University

Top two charities in terms of Dollar Amounts

- ▶ Brown University
- ▶ The Trustees of Columbia University in the City of New York



EDUCATION-JEWISH

Top two charities in terms of # of Grants

- ▶ Magen David Yeshivah
- ▶ Salanter Akiba Riverdale Academy (SAR)

Top two charities in terms of Dollar Amounts

- ▶ Magen David Yeshivah
- ▶ Salanter Akiba Riverdale Academy (SAR)



ENVIRONMENT

Top two charities in terms of # of Grants

- ▶ Central Park Conservancy, Inc.
- ▶ Natural Resources Defense Council, Inc.

Top two charities in terms of Dollar Amounts

- ▶ Brooklyn Botanic Garden Corporation
- ▶ Union of Concerned Scientists, Inc.



HEALTH

Top two charities in terms of # of Grants

- ▶ SBH Community Service Network, Inc.
- ▶ Planned Parenthood Federation of America, Inc.

Top two charities in terms of Dollar Amounts

- ▶ Memorial Sloan-Kettering Cancer Center
- ▶ NYU Hospitals Center



HUMAN SERVICES

Top two charities in terms of # of Grants

- ▶ Chai Lifeline
- ▶ The Sephardic Food Fund, Inc.

Top two charities in terms of Dollar Amounts

- ▶ Citymeals-on-Wheels
- ▶ Chai Lifeline



INTERNATIONAL/ISRAEL

Top two charities in terms of # of Grants

- ▶ P.E.F. Israel Endowment Funds, Inc.
- ▶ American Friends of Yad Eliezer, Inc.

Top two charities in terms of Dollar Amounts

- ▶ American Israel Education Foundation, Inc.
- ▶ American Jewish Joint Distribution Committee



RELIGIOUS

Top two charities in terms of # of Grants

- ▶ Shaare Zion Congregation - Brooklyn, NY
- ▶ Union of Orthodox Jewish Congregations of America

Top two charities in terms of Dollar Amounts

- ▶ Park Avenue Synagogue - New York, NY
- ▶ Union of Orthodox Jewish Congregations of America (OU)

TOTAL: \$396,828,262

Giving Jewishly

When Fundholders choose JCF to facilitate their charitable giving, they are making a powerful statement about giving as a Jewish collective to a broad range of charitable causes in all sectors.

JCF fundholders also benefit from “double bottom line” returns – their fees are reinvested in the Jewish community in the form of a \$2 million gift to the UJA-Federation of New York’s annual campaign, as well as Community Gifts to Jewish organizations from JCF’s endowment, the Special Gifts Fund.



35,170

**GRANTS TO JEWISH
ORGANIZATIONS IN FY 17,
TOTALING \$169,843,989**



Jewish Communal Fund Fundholders granted **\$22 million** to UJA-Federation of New York in 2017. In addition, JCF makes an unrestricted Community Gift of **\$2 million** each year to UJA.

Since 1972, JCF has distributed approximately **\$450 million** to UJA.



The majority of JCF fundholders identify as **Jewish**.

- 96% identify as Jewish
- 2% do not
- 2% selected “prefer not to answer”

JCF Reinvests in the Jewish Community

Since 1999, JCF's endowment, the Special Gifts Fund, has granted more than **\$13 million** to Jewish charities in New York.

JCF'S SPECIAL GIFTS FUND GRANTS IN 2017

\$1.35 million...



\$500k

Digital Choice Food Pantry at the Central Queen Y



\$100k

Building a Sensory Gym at the Harold and Elaine Shames JCC on the Hudson



\$65k

26 Self-help Coffee Houses



\$65k

Camp scholarships for low-income Jewish families



\$125k

Witness Theater Holocaust education project



\$500k

New Home Base at the Henry Kaufmann Campgrounds



JCF fundholders contribute a wide range of assets

\$408,641,690

TOTAL CONTRIBUTIONS IN FY 17

37%

CASH CONTRIBUTIONS

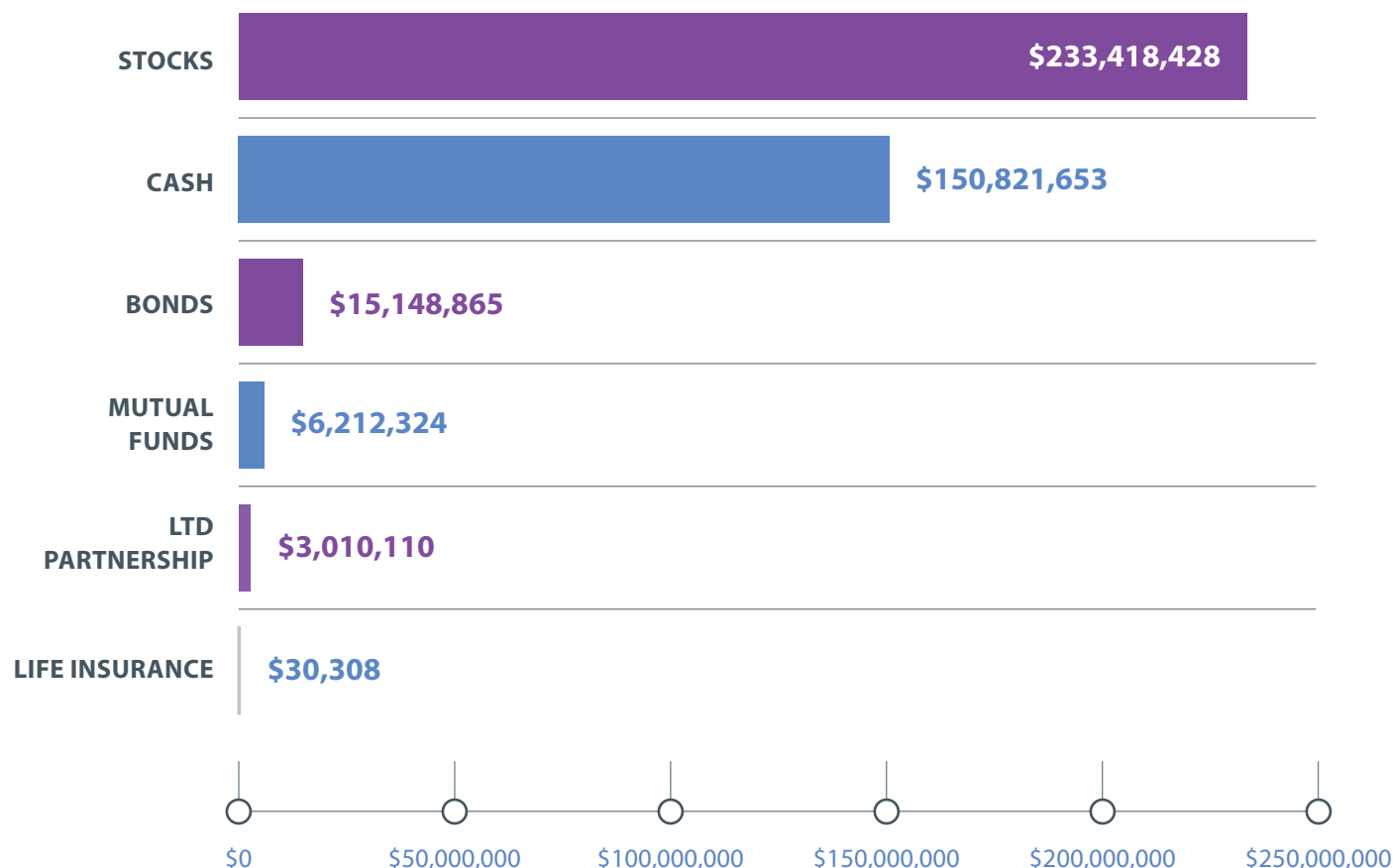
62%

PUBLICLY-TRADED
SECURITIES

1%

COMPLEX ASSETS
(NON-PUBLICLY TRADED)
ASSETS

Total Contribution Amounts by Gift Type





JCF is the donor advised fund of the Jewish community.

Since 1972, the Jewish Communal Fund (JCF) has been helping people achieve their philanthropic and tax-saving goals simply and efficiently, with flexibility, full confidentiality, convenience, and personal service from a dedicated professional staff. JCF has grown to be one of the largest and most generous networks of Jewish philanthropists in the world.

jcfny.org