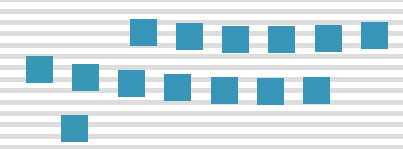




Ottawa Jewish Community Foundation

Annual Report 2013



Past Chairs/ Board of Advisors

1975-1976
Gilbert Greenberg z"l

1977-1979
Bernard Shinder

1980-1981
David Loeb

1982-1983
Norman Zagerman

1984-1985
Sol Shinder

1986-1987
Irving Greenberg z"l

1988-1989
Charles Taylor

1990-1991
Issie Landau z"l

1992-1993
Gerald Berger z"l

1994-1995
Daniel Kimmel

1995-1997
Jacie Levinson

1997-1999
Rose Taylor z"l

1999-2001
Norman Lesh

2001-2003
Saul Goldfarb z"l

2003-2005
Ron Levitan

2005-2007
Gregory Sanders

2007-2009
Roger Greenberg

2009-2011
Harold Feder

2011-2013
Richard Roth

2013 Leadership and Professional Staff

Officers

CHAIR
Lynne Oreck-Wener

IMMEDIATE PAST CHAIR
Richard Roth

VICE CHAIR
Michael Landau

TREASURER AND SECRETARY
Howard Geller

Board of Directors

Shelley Appleby-Ostroff
Howard Geller
Diane Koven
Michael Landau
Mitchell Leitman

Steven Lesh
Lynne Oreck-Wener
Richard Roth
Lorne Segal

BOARD DEVELOPMENT
Richard Roth

FINANCE AND AUDIT
Howard Geller

**FUNDRAISING AND
B'NAI TZEDEK**
Mitchell Leitman
Shelley Appleby-Ostroff

**GEORGE JOSEPH COOPER
SCHOLARSHIP**
Diane Koven

INVESTMENT
Steven Lesh

MARKETING
Lorne Segal

Committees/Chairs

WOMEN'S PHILANTHROPY
Yaffa Greenbaum and
Erica Sher

Professional Staff

PRESIDENT & CEO
Andrea Freedman

**VICE PRESIDENT,
CORPORATE SERVICES**
Leslie Kaufman

ASSISTANT DIRECTOR
Jared Isaacson

CHIEF FINANCIAL OFFICER
Shelley Crawford

**CAMPAIGN AND DATABASE
MANAGER**
Dawn Paterson

FINANCIAL CONTROLLER
Tinh Ly

FOUNDATION ASSOCIATE
Rebecca Nagrodski

GRAPHIC DESIGNER
Sylvie Bordeleau

**TRIBUTE CARD
PROGRAM COORDINATORS**
Jessica Borenstein (maternity)
Jessica Kerzner

HONORARY LEGAL COUNSEL
Harold Feder

Founders

Hyman Bessin z"l
Alex Betcherman z"l
Gilbert Greenberg z"l
Hy Harris z"l
Hy Hochberg z"l
David Loeb
Abe Palmer z"l

Harold Shenkman z"l
Bernard Shinder
Hyman Soloway z"l
Casey Swedlove z"l
Sam Taller z"l
Norman Zagerman





CEO and Chair's Message



As we complete our first year leading the Ottawa Jewish Community Foundation, we are excited about all that has been accomplished and the bright future ahead.

It has been another year of tremendous growth, including:

- Continued outreach efforts with the Foundation's premier events - Pearls of Wisdom and the Power Breakfast, collectively reaching 200 individuals.
- There were **26** new donors to the Foundation. The combination of new funds, the realization of previous insurance gifts and new capital to existing funds resulted in the addition of **\$1.5 million** to the Foundation and it has been estimated that **\$685,000** has been secured for the future through Legacy Gifts.
- By adhering to our investment policy, and a very strong equity performance, assets grew by an impressive **19.9%**.

Along with the outreach, fundraising and investment successes, we have been working hard to plan for the future. This includes: a new donor-friendly website, a five-year strategic plan guiding our actions and setting goals through 2018 and a blossoming relationship with the Jewish Federation of Ottawa to engage in holistic fundraising.

We would like to congratulate the 2013 George Joseph Cooper Scholarship Award winner Elana Moscoe, a most deserving student.

As proud as we are of our accomplishments, we know that much work remains and we need your help. Please consider joining a committee, speaking with a donor or working to promote the Foundation. The Foundation is an extremely well-governed organization, immensely worthy of support, and we need your assistance to ensure that the entire community is aware of the opportunity we provide for people to realize their philanthropic aspirations.

We are grateful for the continued hard work of the Foundation team - our exceptional board members and volunteers, tireless staff, wise and involved past leaders and generous donors. We owe each of you a debt of gratitude - thank you!

We each have the power to make a difference, and when our energy is harnessed together, the possibilities are endless.

It is truly a privilege to serve on behalf of our community.

Sincerely,

Andrea Freedman
President and CEO

Lynne Oreck-Wener
Chair

2013 Grant Commitments

Ottawa Jewish Community Agencies

Agudath Israel Synagogue	583
Beth Shalom Congregation	6,833
Congregation Beit Tikvah of Ottawa	173
Camp B'nai Brith	17,523
Camp Geshet	158
Canada Israel Cultural Foundation	392
Canadian Friends of Torah Academy	3,861
Cheder Rambam School	32,310
Gilbert Greenberg Education Fund	135,240
George Joseph Cooper Scholarship Award	14,115
Hillel Academy Agency Fund	3,514
Hillel Lodge	121,935
Hillel Lodge Ladies Auxiliary	303
Jewish Community of Ottawa	
Development Foundation*	154,073
Jewish Community Campus of Ottawa Inc.	34,090
Jewish Education through Torah	29,914
Jewish Family Services	96,724
Jewish Federation of Ottawa	15,364
Jewish Federation of Ottawa -	
Annual Campaign	273,638
Jewish Federation of Ottawa -	
Ottawa Jewish Archives	6,573
Jewish Federation of Ottawa -	
Hillel Ottawa on Campus	5,418
Jewish Federation of Ottawa -	
Ottawa Vaad HaKashrut	179
Jewish Federation of Ottawa -	
Shoah (Holocaust) Committee of Ottawa	6,391
Jewish Federation of Ottawa/	
OJCS Fundraising Campaign	36,000
Jewish Memorial Gardens	35,657
Jewish Memorial Gardens Agency Fund	19,041
Jewish National Fund	5,165
Jewish Youth Library	7,598
Kosher Food Bank at Agudath Israel	
Synagogue	8,008
Machzikei Hadas Congregation	4,115
Na'amat Ottawa	440
Ottawa Chevra Kadisha	612
Ottawa Hadassah-Wizo	1,847
Ottawa Hebrew Free Loan	239
Ottawa Jewish Community Foundation -	
Legacy Challenge	5,801
Ottawa Jewish Community Foundation -	
Insurance Funds	914

Ottawa Jewish Community Foundation -	
PACE	14,942
Ottawa Jewish Community School	
(Hillel Academy & YRHS)	107,437
Ottawa Jewish Historical Society	7,185
Ottawa Lodge B'nai Brith	66
Ottawa Post Jewish War Vets	1,014
Ottawa Modern Jewish School	3,180
Ottawa Torah Centre Chabad	1,142
Ottawa Torah Institute & Machon Sarah	
High School	18,162
Soloway Jewish Community Centre	118,111
Soloway Jewish Community Centre	
(AJA 50+)	11,747
Star of David Hebrew School	2,342
Talmud Torah Afternoon School	9,207
Tamir Foundation	77,666
Temple Israel Congregation	1,463
Temple Israel Religious School	5,065
Temple Israel (Ottawa) Foundation	5,024
Torah Academy of Ottawa	24,662
Vered Israel Cultural Centre	15,195
Women's Collective Endowment Fund	
Grant recipient	1,651
Total	\$1,510,002

Jewish Agencies North America

Bnei Akiva Schools	447
Conservatory for Judaic Performing Arts	1,523
Emunah Women of Canada	
(Rachel Kizell Chapter)	612
Imre Noam Congregation	500
JACS Toronto	179
London Community Hebrew Day School	100
Mazon Canada	50
Mount Sinai Hospital Foundation - Montreal	74
Nishma Societal Endeavour in Understanding	
Torah	38
Oir Hachaim D'Tash Bois Briand	467
ORT Canada	705
Reena Foundation	216
Ruchama Fraidel Relief Organization	179
Society for the Education of Russian Jews	
(SERJ)	221
Toronto Jewish Free Loan	89
Total	\$5,400

Jewish Agencies in Israel, Ottawa and North America

Yesod & Binah Funds - Grants and Allocations	
(Anonymous)	1,554,399
Tzedek Fund - Grants and Allocations	
(Anonymous)	15,000
Total	\$1,569,399

Israeli Institutions

Beit Halochem Canada/Aid to Disabled	
Veterans of Israel (Canada)	152
Canadian Associates of Ben-Gurion	
University of the Negev	1,133
Canadian Friends of Alyn	93
Canadian Friends of Bar Ilan University	2,691
Canadian Friends of Hebrew University	3,904
Canadian Friends of Jerusalem Blind Institute	456
Canadian Friends of Laniado Hospital	844
Canadian Friends of Ramat Shapira Israel	375
Canadian Friends of Shaare Tzedek Hospital	
Foundation	200
Canadian Friends of Simon Weisenthal	
Foundation	26
Canadian Friends of Weizmann Institute of	
Science	2,726
Canadian Magen David Adom in Israel	1,689
Canadian Technion Society	2,658
Israel Cancer Research Fund	37
Mizrachi Organization of Canada for Yeshiva	
Haye Olam	445
New Israel Fund of Canada	44
Canadian Foundation for Masorti Judaism	392
United Israel Appeal Federations Canada	13,078
Total	\$30,943

Other Organizations

Alzheimer Society Ottawa-Carleton	168
Andrew Fleck Integration Service	241
Arthritis Society	199
Canadian Association for HIV Research	14
Canadian Cancer Society	763
Canadian Diabetes Association	172
Canadian Museum for Human Rights	30,000
Canadian National Institute for the Blind	468
Canadian Orthopedic Foundation	468
Canadian Red Cross Society -	
Ottawa-Carleton Branch	312

Canadian Tribute to Human Rights	95
Carleton University	3,594
Children At Risk Ottawa	121
Children's Hospital Of Eastern Ontario	2,772
Children's Wish Foundation	78
Community Foundation of Ottawa-Carleton	375
Crohn's and Colitis Foundation of Canada	341
Elizabeth Bruyere Research Institute	3,000
Foundation For Fighting Blindness	396
Girls & Boys Club of Ottawa-Carleton	214
Heart and Stroke Foundation	366
Kemptville District Hospital	468
Kidney Foundation of Canada	156
Kiwanis Club of Ottawa Medical Foundation	174
Lisgar Alumni Association	467
Nepean High School	73
North York General Hospital - Sheila Cohen	
Fund for Womens Health	259
Other professional fees and disbursements	24,771
Ottawa Food Bank	38
Ottawa Hospital Foundation	2,402
Ottawa Humane Society	40
Ottawa Regional Cancer Centre Foundation	296
Parkinson's Support and Research Society	15
Parkway House	486
Perley and Rideau Veterans' Health Centre	
Foundation	1,000
Pinchas Zukerman Music Education Fund	7,768
Queen's University	467
Queensway-Carleton Hospital Foundation	2,217
REACH	98
The Salvation Army	467
United Way of Ottawa-Carleton	474
University of Ottawa	1,617
University of Ottawa Heart Institute	
Foundation	1,371
Water-Can	287
Total	\$89,568

Total to Jewish Causes \$3,115,744

To Non-Sectarian Organizations \$89,568

Total Grants to Organizations \$3,205,312

Highlights of 2013

* Grants from the Jewish Community of Ottawa Development Foundation (JCODF) were allocated as follows:

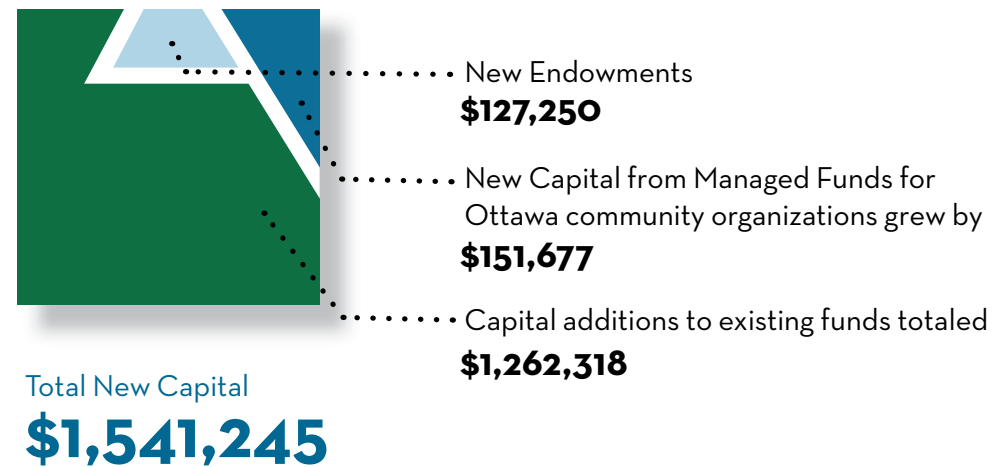
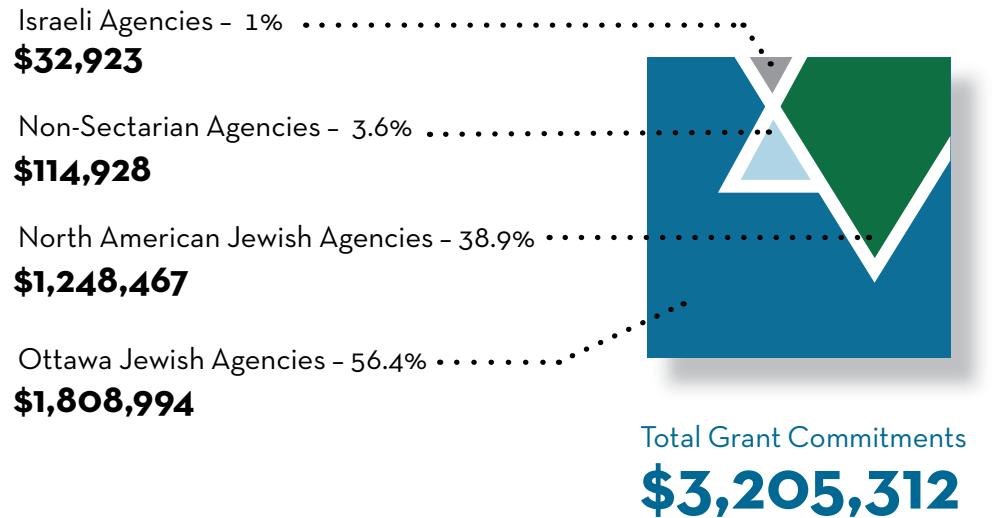
Jewish Family Services	\$6,949
Vered Israel Cultural Centre	\$8,664
Ottawa Jewish Community Foundation	\$4,059
Hillel Lodge	\$55,835
Ottawa Jewish Community School	\$25,768
Soloway JCC	\$25,768
Jewish Federation of Ottawa	\$27,030
Total	\$154,073

The JCODF is a registered charity administered by the Federation and was established for the west-end campus capital campaign. Donations from U.S. donors are accepted by the JCODF.

Growth in Total Assets



The Foundation has more than \$49 million in total capital, including: managed funds; more than \$22 million in deferred gifts – including 113 insurance policies; and Charitable Remainder Trusts.



The Women's Collective Endowment Fund has \$57,700 as of 12/31/2013

Power Breakfast on October 16 had 130 participants.

Pearls of Wisdom on October 27 had 60 people in attendance.

The B'nai Mitzvah Club has 130 members, 8 were new in 2013.

Financial Statement

This information has been presented in condensed form from the complete audited financial statements, which are available upon request.

Balance Sheet as at December 31, 2013	OPERATING FUND	CAPITAL FUND	DEC 31, 2013	DEC 31, 2012
ASSETS				
Cash	\$60,130	\$352,484	\$412,614	\$1,917,777
Investments	\$0	\$50,687,751	\$50,687,751	\$42,002,333
Accounts Receivable	\$154,336	\$0	\$154,336	\$476,350
Interfund Transfer	\$402,105	(\$402,105)	\$0	\$0
	<u>\$616,571</u>	<u>\$50,638,130</u>	<u>\$51,254,701</u>	<u>\$44,396,460</u>
LIABILITIES				
Accounts Payable	\$544,553	\$171,342	\$715,895	\$262,058
Allocations Payable	\$0	\$1,204,145	\$1,204,145	\$1,076,212
Deferred Revenue	\$72,018	\$0	\$72,018	\$71,102
	<u>\$616,571</u>	<u>\$1,375,487</u>	<u>\$1,992,058</u>	<u>\$1,409,372</u>
Managed Funds	\$0	\$8,835,862	\$8,835,862	\$8,703,198
	<u>\$616,571</u>	<u>\$10,211,349</u>	<u>\$10,827,920</u>	<u>\$10,112,570</u>
NET ASSETS				
	\$0	\$40,426,781	\$40,426,781	\$34,283,890
	<u>\$616,571</u>	<u>\$50,638,130</u>	<u>\$51,254,701</u>	<u>\$44,396,460</u>
Income Statement for the year ended December 31, 2013	OPERATING FUND	CAPITAL FUND	DEC 31, 2013	DEC 31, 2012
INCOME (LOSS)				
Investment	\$6,844,780	\$0	\$6,844,780	\$3,429,547
Endowments and bequests	\$0	\$1,419,046	\$1,419,046	\$1,861,804
	<u>\$6,844,780</u>	<u>\$1,419,046</u>	<u>\$8,263,826</u>	<u>\$5,291,351</u>
EXPENSES				
	\$464,212	\$0	\$464,212	\$434,279
NET EARNINGS				
	\$6,380,568	\$1,419,046	\$7,799,614	\$4,857,072
Allocation Commitments	(\$1,422,528)	(\$234,195)	(\$1,656,723)	(\$2,858,857)
Net result for the year	\$4,958,040	\$1,184,851	\$6,142,891	\$1,998,215
Net assets, beginning of year	\$0	\$34,283,890	\$34,283,890	\$32,285,675
	<u>\$4,958,040</u>	<u>\$35,468,741</u>	<u>\$40,426,781</u>	<u>\$34,283,890</u>
Interfund transfer	(\$4,958,040)	\$4,958,040	\$0	\$0
NET ASSETS, end of year	<u>\$0</u>	<u>\$40,426,781</u>	<u>\$40,426,781</u>	<u>\$34,283,890</u>

New Funds Established in 2013

Andrea Freedman Endowment Fund
Chani and Bram Bregman Jewish Education Fund
Fund For the Next Generation
Joshua Barak and Ashira Prizant Family Fund
Leitman/Katz Family Fund
Ottawa Jewish Community School Parent Fund

New Funds By Bequest

The Edith and Reuben Dubrofsky Memorial Fund
Edna Goldfarb LOJE Endowment Fund

Lion of Judah Endowments

Jessica Kerzner
Linda Kerzner
Leiba Krantzberg

New B'nai Mitzvah Funds

Stefanie Ages	Noah Reichstein
Jacob Ibgby	Ariella Ruby
Abby Mandelker	Tom Sachs
Amanda Robyn McCarthy	Dani Eva Taylor

Legacy Gifts

Eddy Cook	Dr. Truda Rosenberg
Sandi Cook	Anonymous
Lynne Oreck-Wener	Anonymous

New Insurance Policy Holder

Steven Kerzner



Top left: Len Farber, Gillie Vered

Top right: Jessica Kerzner, Jody Saikali

Bottom left: Barbara Crook, Aviva and Liat Ben-Choreen

Bottom right: Rhoda Levitan, Lynne Oreck-Wener, Zoe Oreck and Taryn Wener

In Memory

The Ottawa Jewish Community Foundation respectfully acknowledges the following fund holders we have lost over the year.

May 1, 2013 to April 30, 2014

Esther Ages z"l
Anne Mayberger Blair z"l
Barry Davis z"l
Reuben Dubrofsky z"l
Reuben Fine z"l
Anne Globerman z"l
The Right Honourable Herb Gray z"l
Stanley Katz z"l

Morris Lang z"l
Jean Lichtenstein z"l
Evelyn Potechin z"l
Norman Potechin z"l
Florence Rosenfeld z"l
Miriam Weiner z"l
Inez Zelikovitz z"l



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FOREVER.**

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