

NAVIGATING THE
PHILANTHROPIC
LANDSCAPE 

LETTER TO OUR COMMUNITY

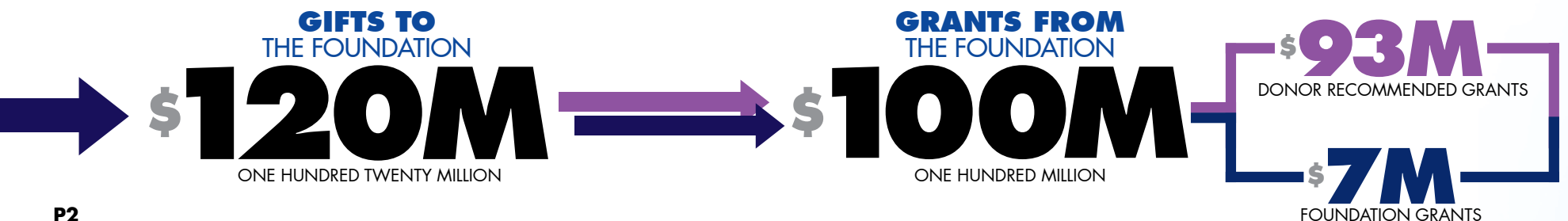
Our 2017 financial results reflect yet another remarkable year: Total assets rose to \$1.25 billion, The Foundation received \$120 million of donor contributions, and we distributed more than 10,000 grants. Amid these impressive figures, the one that's most inspiring to us is this milestone: **awarding \$100 million of grants last year, a record amount** and a 23 percent increase from the prior year. Reaching this new threshold of Foundation grantmaking reflects our donors' boundless generosity and enduring passion to improve the world.

As this record \$100 million of grants flows into the community, Foundation donors face an increasingly complex charitable landscape. Today, there are more pressing needs and more nonprofits addressing those needs than ever—locally, nationally, and in Israel. Philanthropists confront an often-bewildering array of organizations focusing on issues they're concerned about. Additionally, recent tax law changes have brought new challenges and uncertainty to charitable giving, along with significant financial implications. Determining which nonprofits to support—and how best to go about it from a tax planning perspective—can at times seem overwhelming.

This environment inspired the theme of this year's annual report, ***Navigating the Charitable Landscape***. Increasingly, families turn to The Foundation and our **Center for Designed Philanthropy** seeking guidance about the ideal route to take on their journeys along philanthropic pathways. Whether it's determining how to give more strategically, where they can make the most impact, or how to engage their family in meaningful philanthropy, many have come to rely on The Foundation as a trusted partner in charting the path forward. As our longtime donor **Bruce Whizin** (featured on pages 6–7) says, "Virtually every nonprofit in town is supported by The Foundation, so they know the landscape better than anyone."

In this year's edition, you'll meet Bruce and his family, along with the **Schwartz, Gerber, and Hyman** families—all of whom are skillfully traversing this complex charitable terrain. A selected list of their giving to a wide variety of causes across the horizon is plotted on pages 4–5 to illustrate the path each family has opted to take. They represent 1,300-plus Foundation donors, all of whom have chosen a unique journey through the charitable landscape. We are most grateful to serve as their trusted guide along the way.

2 0 1 7 Y E A R O F G I V I N G A T A G L A N C E :



To find out more about our donor families, view several videos, and learn how The Foundation has assisted them in navigating the philanthropic landscape, please visit www.jewishfoundationla.org/stories.

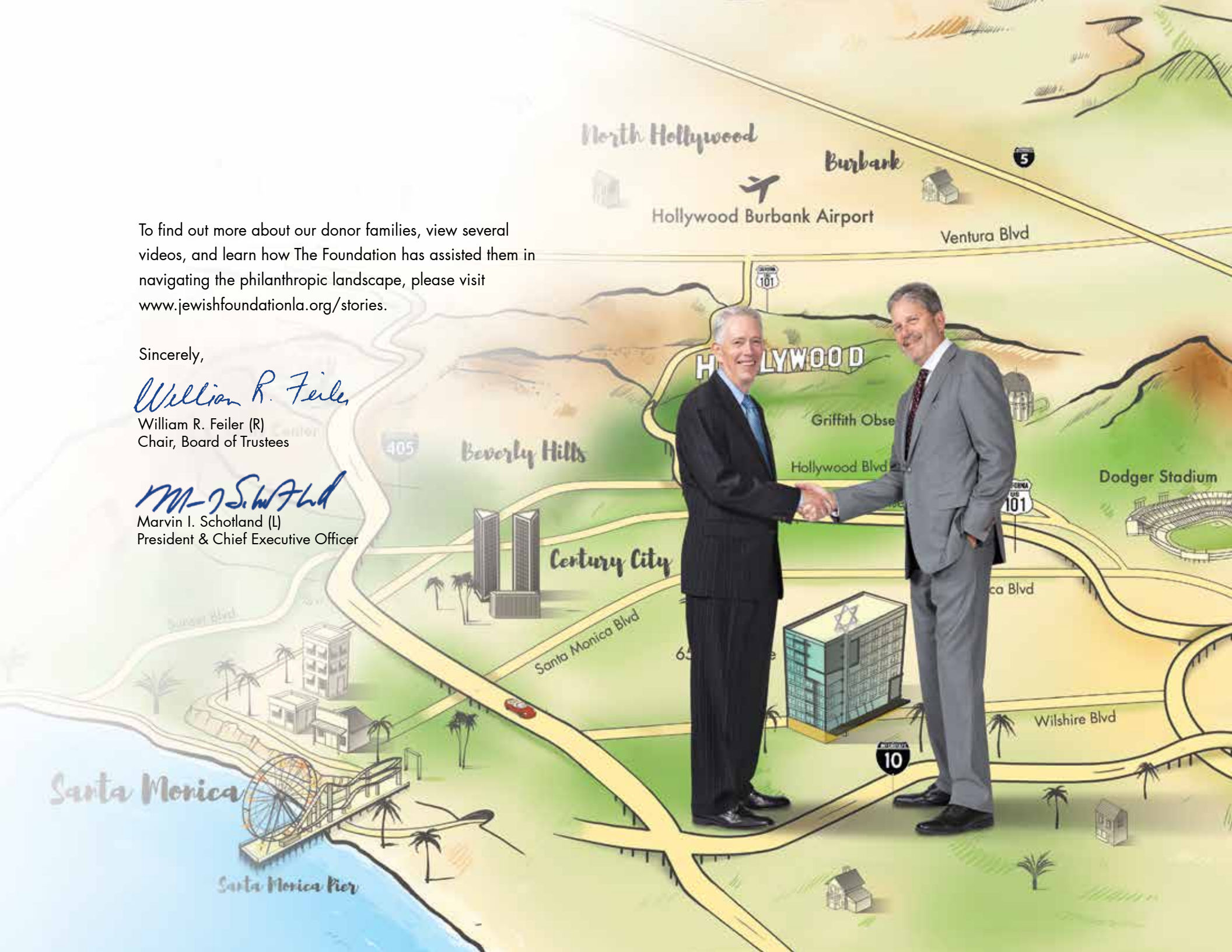
Sincerely,

William R. Feiler

William R. Feiler (R)
Chair, Board of Trustees

Marvin I. Schotland

Marvin I. Schotland (L)
President & Chief Executive Officer





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- USA -

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OUR DONORS COVER THE MAP!

With a record \$100 million in grants in 2017, The Foundation and its donors are a powerful force for good throughout Los Angeles, the U.S. and in Israel. Illustrated here is the selected grantmaking of the Whizin, Schwartz, Gerber and Hyman families who are featured on the next pages. They represent our 1,300 donor families whose generosity permeates the philanthropic landscape.

WHIZIN FAMILY GRANTS



LOS ANGELES

1. Adat Ari El
2. American Jewish University
3. Beit T'Shuvah
4. Camp Ramah in California
5. Children of the Night
6. de Toledo High School
7. IKAR
8. Jewish Family Service
9. Jewish World Watch
10. LA Family Housing
11. Los Angeles Jewish Home
12. Los Angeles Police Foundation
13. Pico Union Project

NATIONAL

14. ACLU
15. Jewish Theological Seminary
16. Memorial Sloan Kettering Cancer Center

ISRAEL

17. Boys Town Jerusalem
18. Masorti Foundation for Conservative Judaism in Israel
19. Leket Israel
20. New Israel Fund

GERBER FAMILY GRANTS



LOS ANGELES

1. A Place Called Home
2. Aquarium of the Pacific
3. Beth Jacob Congregation
4. Bnei Akiva of Los Angeles
5. Chai Lifeline
6. Gindi Maimonides Academy
7. Harkham Hillel Hebrew Academy
8. Jewish Free Loan Association
9. Limmud LA
10. Shalom Institute Camp & Conference Center
11. The Eiden Project of Chabad of S. La Cienega
12. The Jewish Montessori
13. Young Israel of North Beverly Hills

ISRAEL

14. Israel Philharmonic Orchestra

SCHWARTZ FAMILY GRANTS



LOS ANGELES

1. Bet Tzedek
2. Cedars-Sinai Medical Center
3. Chabad of Claremont Colleges
4. Claremont McKenna College
5. Dream Street Foundation
6. Lupus LA
7. Maple Counseling Center
8. New Directions for Veterans
9. StandWithUs
10. Temple Emanuel of Beverly Hills
11. Hillel at UCLA

NATIONAL

12. Harvard Business School
13. Center for Holocaust & Genocide Studies at U.S. Military Academy West Point
14. UJR Camp Newman

ISRAEL

15. Technion
16. Magen David Adom

HYMAN FAMILY GRANTS



LOS ANGELES

1. Etta Israel Center
2. Jewish Federation of Greater Los Angeles
3. Merkaz HaTorah Community Kollel
4. Sharsheret
5. Tomchei LA
6. TreePeople
7. USO
8. Yachad, National Jewish Council for Disabilities
9. Young Israel of Century City
10. YULA High School

NATIONAL

11. American Jewish Joint Distribution Committee
12. Tuberous Sclerosis Alliance
13. US Holocaust Memorial Museum
14. Yeshiva University

ISRAEL

15. Shaare Zedek Medical Center
16. Shurat HaDin Law Center
17. Yad Eliezer
18. Yad Sarah





LIFE'S PURPOSE IS FOR HELPING **PEOPLE**

Helping others is at the core of **Bruce Whizin's** family, including daughter **Sarah** and son-in-law **Michael Schultz**, and their three children. "We believe in helping people—everybody and anybody," says Sarah, "and we teach our children that giving from the heart, both financially and by volunteering, is vital." The family has an ideal mentor in Bruce, a lifelong philanthropist who is following in the footsteps of his parents, Shirley and Arthur, of blessed memory, noted benefactors throughout the Jewish world for more than half a century.

Keenly focused on Jewish education, Bruce founded the **Whizin Center for Continuing Education at American Jewish University** in 2006, and it's now among the largest such programs in the world. In 1991, he and his wife, Shelley, created the **Shirley and Arthur Whizin Center for the Jewish Future**. His philanthropy has spread throughout the entire Jewish community, in Israel, and the secular world, touching thousands of people's lives. "I feel like my purpose for coming into this world was philanthropy," explains Bruce. "It's immensely fulfilling work."

To simplify his giving, Bruce turned to The Foundation. "Virtually every nonprofit in town is supported by The Foundation," he explains, "so they know the landscape better than anyone. Having our charitable fund there has sweetened our lives immensely."



(L-R) Jordyn Schultz, Bruce Whizin, and Jake, Zoe, Michael, & Sarah Schultz relaxing in Valley Village.

A SELECTION OF **WHIZIN** FAMILY GRANTS ▲

LOS ANGELES

1. Adat Ari El
2. American Jewish University
3. Beit T'Shuvah
4. Camp Ramah in California
5. Children of the Night
6. de Toledo High School
7. IKAR
8. Jewish Family Service
9. Jewish World Watch
10. LA Family Housing
11. Los Angeles Jewish Home
12. Los Angeles Police Foundation
13. Pico Union Project

NATIONAL

14. ACLU
15. Jewish Theological Seminary
16. Memorial Sloan Kettering Cancer Center

ISRAEL

17. Boys Town Jerusalem
18. Masorti Foundation for Conservative Judaism in Israel
19. Leket Israel
20. New Israel Fund





TIKKUN OLAM WOVEN INTO THEIR DNA

Longtime Beverly Hills residents **Lisa** and **Mark Schwartz** exude a palpable sense of joy and enthusiasm for helping others. “There is no better feeling than giving back and improving the lives of others,” says Mark. “It’s immensely gratifying.” For Lisa, a community activist and City of Beverly Hills commissioner, and Mark, a successful entrepreneur, venture capitalist, and Foundation trustee, *tikkun olam* is woven into their DNA.

For nearly 30 years, Lisa has been volunteering at **Camp Dream Street** for seriously ill children. “It just warms my heart to see the smiles on the campers’ faces, knowing that the kids just had the best day of their lives.” Mark loves helping students succeed at his alma mater, **Claremont McKenna College**, by supporting scholarship initiatives and lecturing on entrepreneurship.

They chose to conduct their philanthropy—which permeates the Jewish, Israeli, and secular worlds—through The Foundation. As Mark explains, “The Jewish Community Foundation is an incredibly efficient way to make charitable donations, especially when transferring stock. Plus making grants is so easy to do online 24/7.” As a Foundation trustee, Mark offers his vote of confidence: “I think The Foundation is the best managed nonprofit I’ve ever been associated with due to its leadership, the staff’s longevity, and their encyclopedic knowledge of philanthropy.”



(L–R) Lisa and Mark Schwartz (standing) and their children, Kirsten and Kyle, at home on the Westside.

A SELECTION OF **SCHWARTZ** FAMILY GRANTS ♦

LOS ANGELES

1. Bet Tzedek
2. Cedars-Sinai Medical Center
3. Chabad of Claremont Colleges
4. Claremont McKenna College
5. Dream Street Foundation
6. Lupus LA
7. Maple Counseling Center
8. New Directions for Veterans
9. StandWithUs
10. Temple Emanuel of Beverly Hills
11. Hillel at UCLA

NATIONAL

12. Harvard Business School
13. Center for Holocaust & Genocide Studies
at U.S. Military Academy West Point
14. UJR Camp Newman

ISRAEL

15. Technion
16. Magen David Adom





GOING **ALL IN** WITH THEIR PHILANTHROPY

Jewish continuity is a core focus of **Natalie** and **Jonathan Gerber's** philanthropy. That's why they primarily support a wide range of Jewish causes, including day schools, synagogues, and summer camp. But they don't just write checks. Rather, they believe in "going all in" with their philanthropy. "It's not just about making a contribution," says Natalie, but also about asking, "How can we more strategically help your nonprofit succeed?" By giving generously of their time and expertise—like volunteering on numerous boards—they imbue their three children with a clear sense of *tikkun olam*.

For example, Natalie and Jonathan were among the core founders of **Moshava Alevy**—the only Orthodox sleepaway summer camp on the West Coast—enabling hundreds of LA kids to attend a camp best suited to their needs.

As a professional wealth manager, Jonathan sees great value in The Foundation. "With a Donor Advised Fund, our giving is more strategic and disciplined. We can set aside charitable resources when it's advantageous for us and then think more critically over time about which causes to support." His advice to young families? "The sooner you get involved with The Foundation and take your philanthropy more seriously, the better off you'll be."



(L-R) Alice, Jonathan, Lenny, Charlie, and Natalie Gerber at Rancho Park in LA's Westside neighborhood.

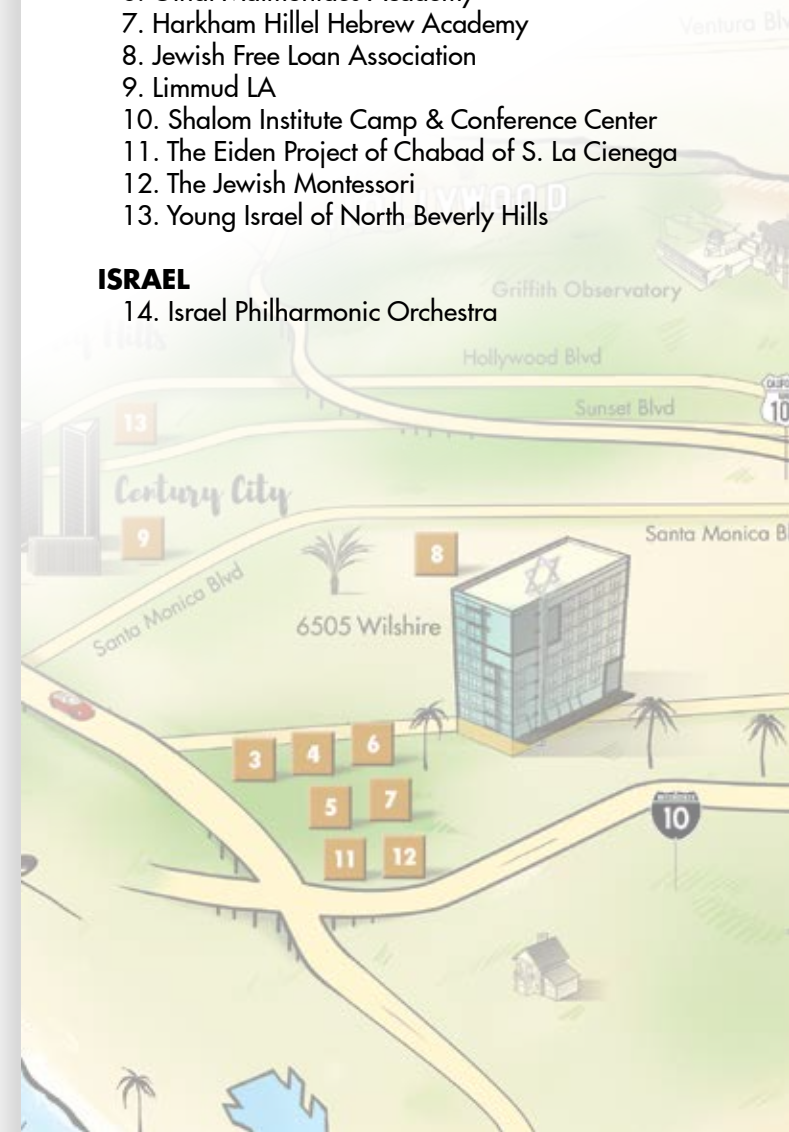
A SELECTION OF **GERBER** FAMILY GRANTS ■

LOS ANGELES

1. A Place Called Home
2. Aquarium of the Pacific
3. Beth Jacob Congregation
4. Bnei Akiva of Los Angeles
5. Chai Lifeline
6. Gindi Maimonides Academy
7. Harkham Hillel Hebrew Academy
8. Jewish Free Loan Association
9. Limmud LA
10. Shalom Institute Camp & Conference Center
11. The Eiden Project of Chabad of S. La Cienega
12. The Jewish Montessori
13. Young Israel of North Beverly Hills

ISRAEL

14. Israel Philharmonic Orchestra





A FAMILY WHO GIVES WITH MEANING

For Doctors **Sheryl Neuman** and **Mark Hyman**, philanthropy is a way of Jewish life to be passed down to their children. When the oldest of their four sons approached bar mitzvah age, Sheryl and Mark decided to celebrate the event in Israel—and determined that all gift giving would be designated toward an Israel-based charity. With their parents' help, each of the boys selected the organization that would receive his bar mitzvah gifts, and the family arranged to see firsthand the work being accomplished.

In addition to the family's focus on Israel, they also dedicate significant support to **The Jewish Federation of Greater Los Angeles** and to local schools, synagogues, and secular causes. "We try to gain an understanding of the different needs that exist," Mark explains. "Money follows meaning."

Giving through their charitable fund at The Foundation is a wonderful way for their family to connect to community and make a difference. "When you're part of The Foundation, you can be bigger than yourself," Mark says. "However you identify with your Judaism, when we are united, we never lose. The Foundation allows you to express that."



Sheryl Neuman and Mark Hyman at home in Beverlywood with their sons (L-R), Ari, Jesse, Noah, and Micah.

A SELECTION OF **HYMAN** FAMILY GRANTS ●

LOS ANGELES

1. Etta Israel Center
2. Jewish Federation of Greater Los Angeles
3. Merkaz HaTorah Community Kollel
4. Sharsheret
5. Tomchei LA
6. TreePeople
7. USO
8. Yachad, National Jewish Council for Disabilities
9. Young Israel of Century City
10. YULA High School

NATIONAL

11. American Jewish Joint Distribution Committee
12. Tuberous Sclerosis Alliance
13. US Holocaust Memorial Museum
14. Yeshiva University

ISRAEL

15. Shaare Zedek Medical Center
16. Shurat HaDin Law Center
17. Yad Eliezer
18. Yad Sarah

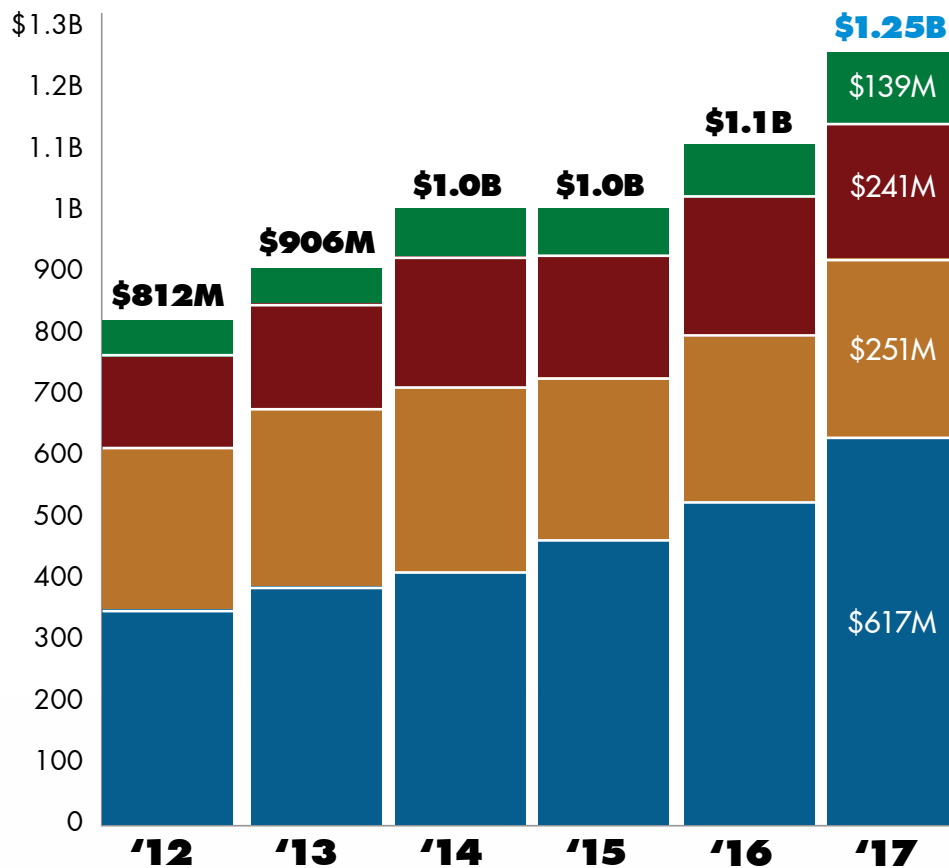


FOUNDATION ASSETS

A **SNAPSHOT**

Total assets reached \$1.25 billion,
a 14% increase year over year.

TOTAL ASSETS



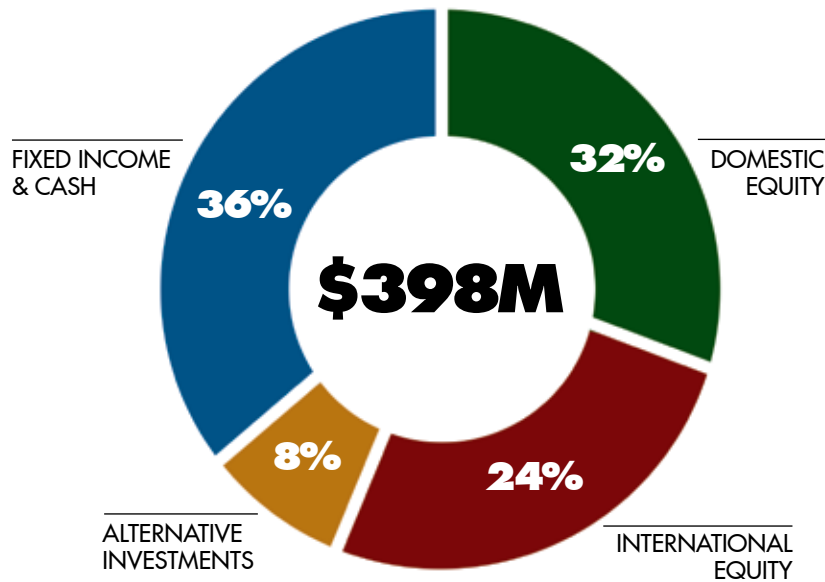
- **DONOR ADVISED FUNDS** comprise \$617 million of assets, the largest pool, representing nearly 50% of all assets. This popular charitable tool requires a \$5,000 minimum gift to begin.
- **ENDOWMENT FUNDS** provide ongoing support to a donor's favorite causes, a specific field of interest, or The Foundation's community grants. In 2017, they totaled \$251 million of assets and require a minimum of \$25,000 to get started.
- **FAMILY SUPPORT ORGANIZATIONS** create a permanent legacy of family philanthropy, carried forward between generations. These funds reached \$241 million of assets and require a minimum of \$2.5 million to start.
- **AGENCY FUNDS** Nonprofit agencies often rely on The Foundation to manage their endowments and reserve funds. Agency Funds amounted to \$139 million in assets.

All dollars in **M** are millions and in **B** are billions.



The Foundation's **Common Investment Pool** is a balanced portfolio focused on a long-term strategy of growth and preservation of capital. The **Strategic Return Fund**—available for Donor Advised Funds of \$50,000 or more—is a diversified portfolio with a long-term growth objective. Both portfolios are overseen by our Investment Committee, a group of seasoned professionals managing portfolios worth billions of dollars. The Investment Committee relies on investment managers specializing in specific asset classes and works with an independent investment consultant, Canterbury Consulting, to regularly analyze market conditions and monitor the portfolios' performance and risk.

COMMON INVESTMENT POOL ALLOCATION - \$398M



RATES OF RETURN (%)

as of 12/31/2017

	1YR	3YR	5YR	7YR	10YR
CIP	14.1	5.8	6.7	6.7	4.6
SRF*	14.6	5.2			

■ COMMON INVESTMENT POOL (CIP)
 ■ STRATEGIC RETURN FUND (SRF)
 *Inception, October 2013

Consolidated Financial Statements

Statement of Financial Position

Assets	12/31/2017	12/31/2016
Cash and investments	\$1,235,956,000	\$1,074,661,000
Other assets	12,198,000	19,086,000
Total assets	\$1,248,154,000	\$1,093,747,000
Liabilities and net assets		
Liabilities	\$234,095,000	\$171,701,000
Net assets	1,014,059,000	922,046,000
Total liabilities and net assets	\$1,248,154,000	\$1,093,747,000

Statement of Activities

Revenue	2017	2016
Contributions	\$120,380,000	\$113,819,000
Other revenue	79,887,000	44,970,000
Total revenue	200,267,000	178,789,000
Expenses		
Grants	100,183,000	78,490,000
Other expenses	8,071,000	7,551,000
Total expenses	108,254,000	86,041,000
Change in net assets	92,013,000	92,748,000
Net assets at beginning of year	922,046,000	829,298,000
Net assets at end of year	\$1,014,059,000	\$922,046,000

The Foundation is committed to be a faithful and efficient steward of assets on behalf of its many donors.

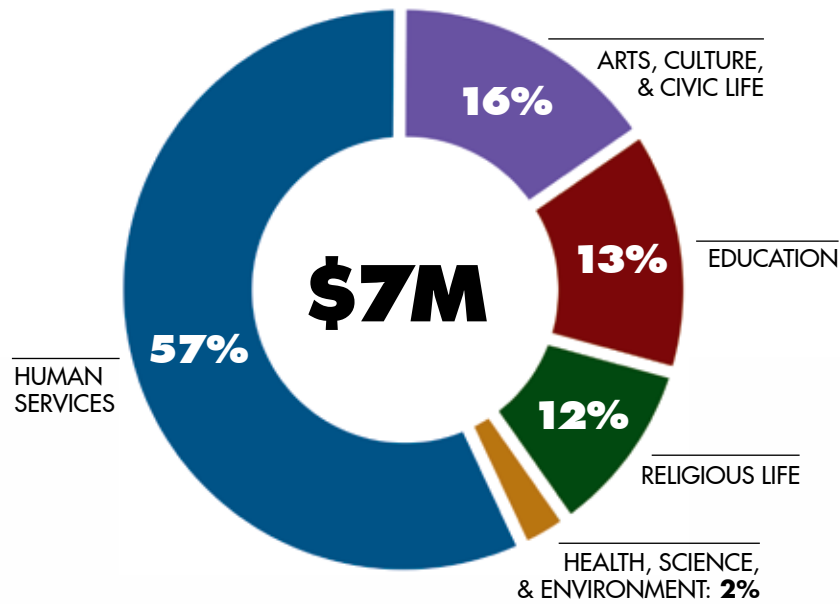
The Foundation and its Board of Trustees work with an independent auditor, Moss Adams LLP, to ensure that management provides accurate and reliable financial information. The summarized financial reports above are unaudited and based on the 2017 audited financial statements, which can be found at www.jewishfoundationla.org/financials.

In 2017, The Foundation's operating expenses were approximately 0.5% of total assets, which is much lower than for many community foundations. The Foundation has operated at or under budget every year for more than two decades, allowing it to invest additional dollars into the community.

\$100 MILLION

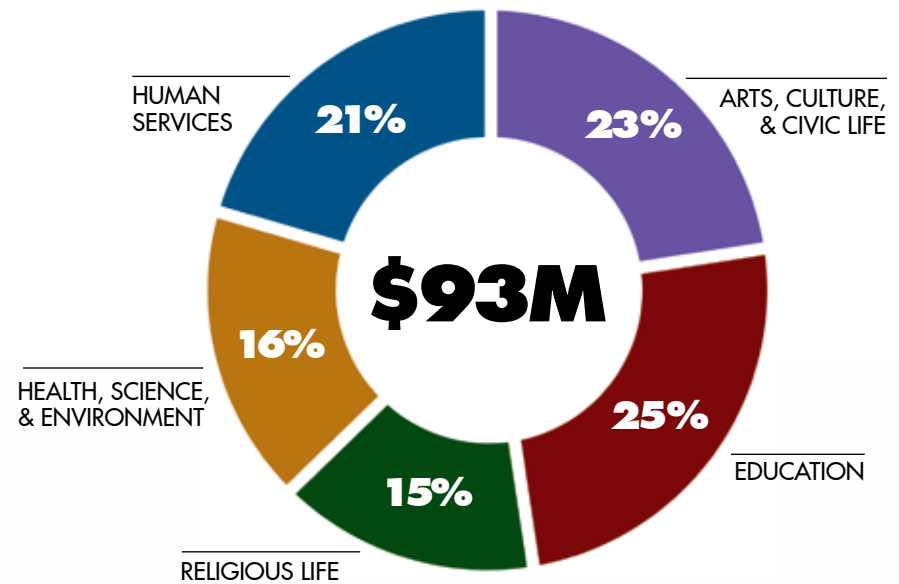
COMBINED \$7 MILLION OF FOUNDATION GRANTS IN SIX CATEGORIES*

FOUNDATION GRANTS* BY FIELD OF INTEREST



Similar to prior years, more than half of all Foundation grants, or 57%, supported Human Services.

DONOR GRANTS BY FIELD OF INTEREST



The three core areas of donor grantmaking remain almost evenly split between Human Services; Education; and Arts, Culture, & Civic Life.

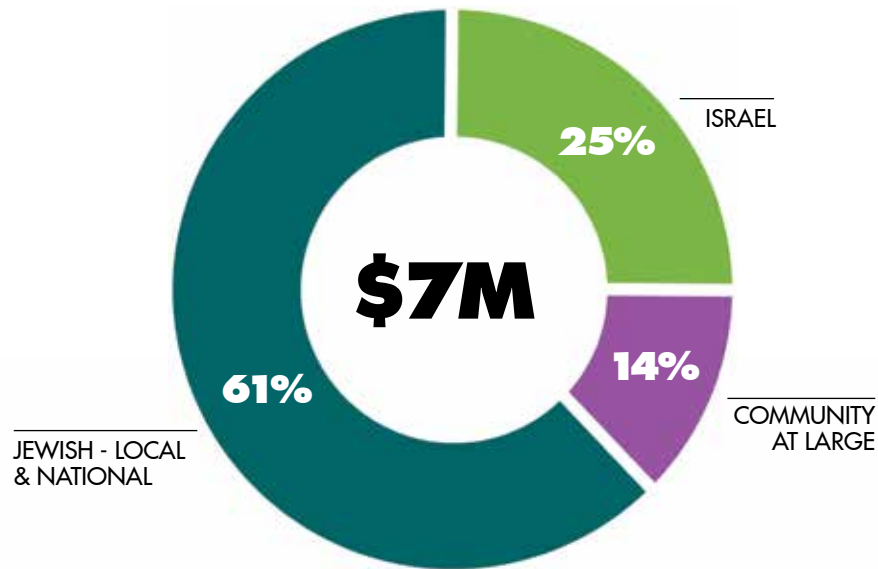
*Foundation Grants in 2017: Cutting Edge Grants • Next Stage Grants • Israel Grants • General Community Grants • Capital Grants • Other Endowment Grants



OF TOTAL GRANTS

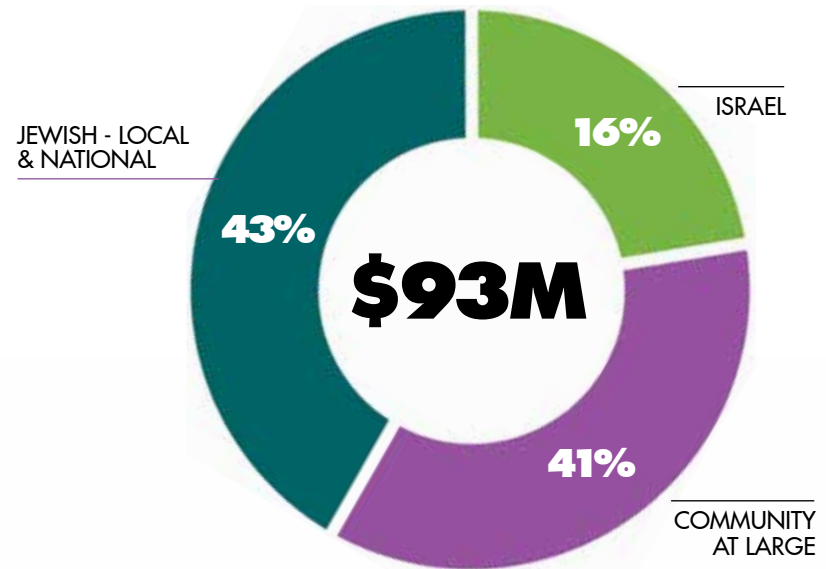
& \$93 MILLION IN DONOR GRANTS ACROSS THE PHILANTHROPIC LANDSCAPE

FOUNDATION GRANTS* BY SECTOR

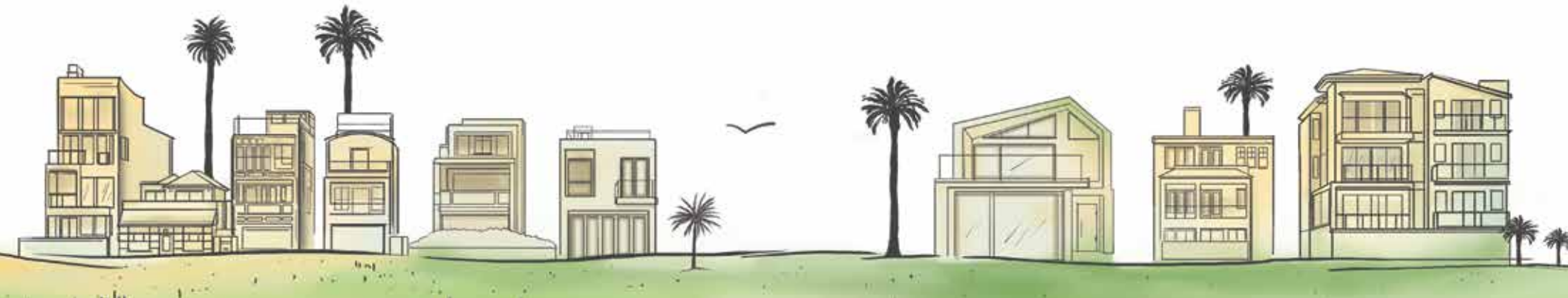


Jewish causes remain the core focus of Foundation grantmaking, with 61% of grants designated for local and national Jewish causes.

DONOR GRANTS BY SECTOR



Donors recommended nearly equal amounts of grants to both the Jewish community locally and nationally and the community at large.



STRENGTHENING OUR **COMMUNITY**

The Foundation builds community through several grant programs. These include Cutting Edge, Next Stage, Israel, General Community and Capital Grants, and Other Endowment Grants. This past year, \$7 million flowed across our community through these grants programs.

While the majority of these grants provide vital support to the Jewish community, The Foundation also helps to strengthen nonprofits in Greater Los Angeles through our annual General Community Grants. Nearly \$2 million has been awarded over the past decade through these grants to high-priority concerns such as human trafficking, foster youth, domestic violence, homelessness, and others. Additionally, Foundation donors distribute millions of dollars in grants each year to nonsectarian causes through their charitable funds. In 2017, more than 40% of all donor giving supported the community at large.

The Foundation and its 1,300 donor families proudly support the essential work of these organizations, and we thank them for making LA a better, more caring, and vibrant community for all.

THE FOUNDATION
JEWISH COMMUNITY FOUNDATION
LOS ANGELES





Numerous community leaders from nonprofits that received General Community Grants over the past several years were honored by The Foundation and its donors for their outstanding contributions to Los Angeles. We deeply appreciate their achievements and significant impact on our community.

A LEGACY IS ONLY AS GOOD AS WHO **YOU TRUST** TO WATCH OVER IT

We gratefully recognize the more than 300 families who had the foresight and commitment to help build the future by creating endowments at The Foundation over nearly 65 years. We celebrate their legacy, for this generation and generations to come, and we thank them for enabling The Foundation to grow to \$1.25 billion of charitable assets.

To learn more about the power of endowments and how The Foundation ensures that its donors' legacies are fulfilled, please contact The Foundation's Development Department at 323.761.8704 or development@jewishfoundationla.org.



ENDOWMENTS FUNDED IN PERPETUITY

Anonymous
Dr. Herbert B. & Freda Alexander
M. Allenberg
Jacob J. & Fayga Alpert
Bobbi Asimow Memorial
Ben & Sarah Baran
Max & Anna Baran
Milton Baran
Ralph & Janice Baxter
Ada M. Bay
Elly Bayer Family
Harriet Beck
Esther & Ralph Bedrock
Dr. Benjamin M. Bendat
Irving & Jeannette Benveniste
J.B. Berland
Ben Berman & Shirley Rogers Berman
Julius & Rose Bisno
BJE Ulpan
Stanley H. Black
Eric & Paula Bloom
Drew Andrew Blumberg
Charles H. & Kharlene Boxenbaum
Harry & Anna Borun
Jacqueline Briskin
Samuel J. Briskin
Frances Brody
Alvin Bronstein
Carolyn & Gerald Bronstein
Anne Elaine Brown
Charles Brown
Lynette Brown
Irwin Buchalter
Stuart Buchalter Memorial
George Burns
Dr. Maxwell S. & Betty C. Cagan
Carlan Family
Daniella Shaina Lee Casper
Colette Chanel
Abram & Sylvia Chasens
Chaverim Fund For Jewish Disabled
Rose Chorna
Rabbi Bernard & Ethel Cohen
Max Cohen
Roselyn Cohen

Jacob & Zlata Colloff
Dorothy Corwin
Lisa Anne Corwin
Allan B. Cutrow
Cutrow Family
Czucker Family
Lissi E. Danelius
David G. & Bella L. Davis
Albert DeBro
Ronald P. Denitz
Donal S. & Phyllis N. Dreifus
Constance & Sydney Dunitz
Edmond Family
Marvin & Ruth Elfenbein
Barbara & Robert Ellison
Louie Ember
Randy Entin Memorial
Doris Factor
Milton & Olga Farbstein
Mimi Alpert Feldman
Dorothy Fenmore
Julia Fischer
Ida Fleischer
David & Rena Fox
Howard & Evelyn Fox
Rose Freeman
Mac & Belle Friedman
Galanter Family
Josephine Gang
Martin Gang
Gang, Tyre, Ramer & Brown
Martin Gaynor
Jerry Gerard
Sol & Ruth Gerber
Bessie Gillis
Isadore & Mildred Ginsberg
George Gittelsohn
Harry Gittelsohn
Marcus Glaser
Morris & Sally Gluck
Jerry & Jeanine Goldberg
Murray & Mildred Goldberg
David & Freda Goldstein
Roslyn Goldstine
William & Alfrida E. Goldwyn
Regina R. Golomb
Julius Goodman

Samuel Gordon
Lena Gorelick
Jeanne B. Goren
Osias & Dorothy Goren
Fay Bettye Green
Ike & Peggy Greenberg
Arthur Groman
Herman Gronauer
Sam & Bessie Gutlin
Emmy Haarmann
Marilyn & Monty Hall
Elisa Heather Halpern
D. Handler
Edith & Joseph Harris
Fannie Hartman
Irwin Held
Larry Held
Masha S. Henley
Stephen Herr
Arnie & Fern Heyman
Walter Hilborn
Herbert Hill
Leo & Pauline Hirsh
Benjamin Horowitz
Ely Jacobs
Leo Jacobs
Jewish Big Brothers Camp Max Straus Fund
Jewish Community Foundation Scholarship Fund
JFS Family Violence Project Fund
Stella F. Joseph
Daniel Kalish
Sue M. Kaplan
Rose Karol
Jack Karp
Myrtle A. Karp
Maurice J. & Fay B. Karpf
Alan Kassin Memorial
Joan & Richard Katz Family
Sidney & Helen Katz
Stanley F. Katz
David B. Katzin
Sidney Kaufman
R. Raymond & Edith N. Kay
Sandra Kaye
Ely Keenberg
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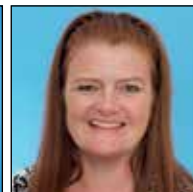
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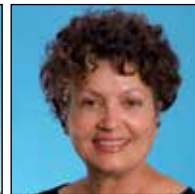


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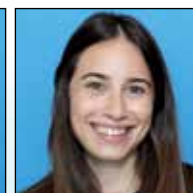
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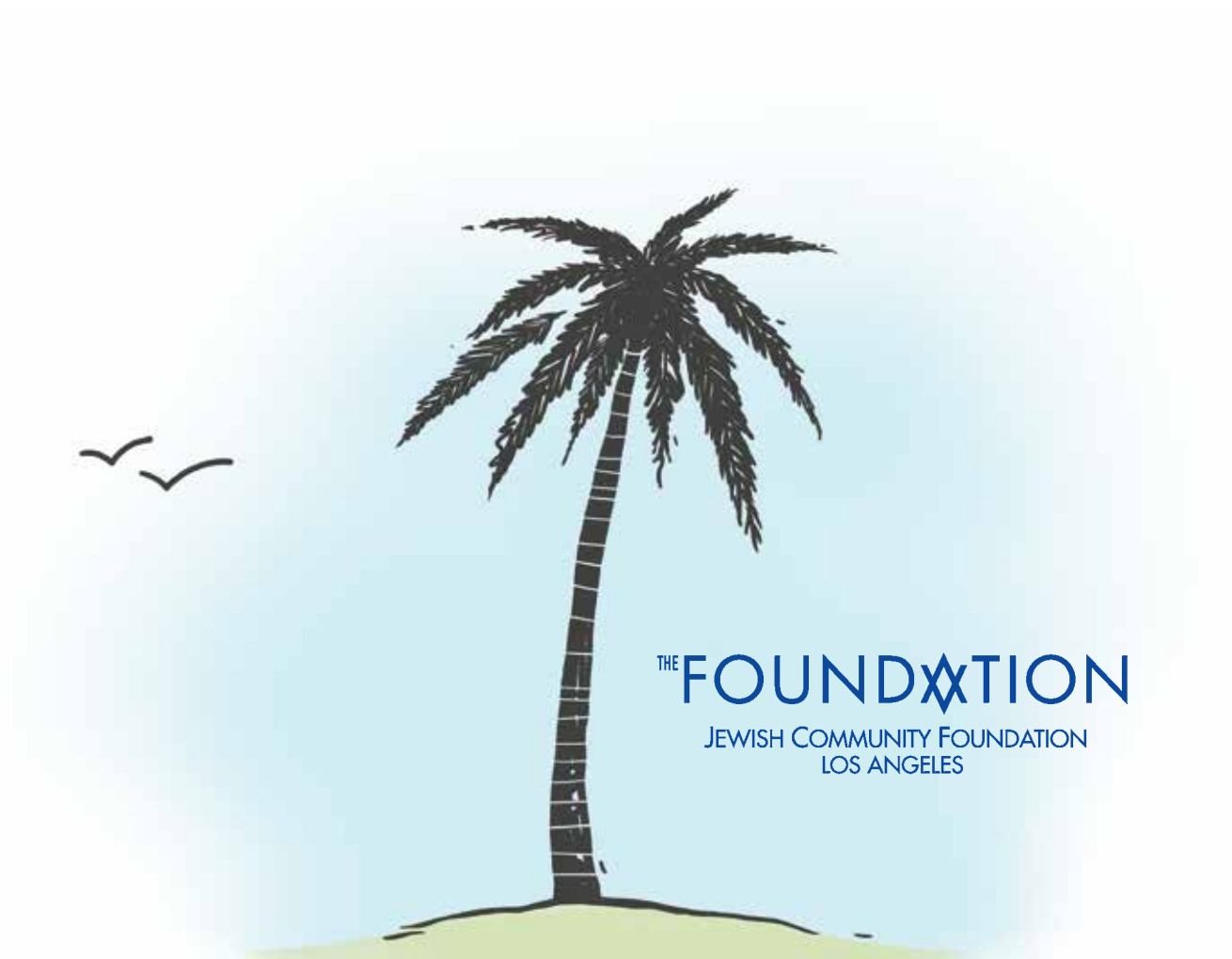
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