

THE POWER OF PHILANTHROPY

SUMMER 2016 | AV 5776

A Foundation for the Future

Strategic planning process looks to increase growth and effectiveness

“Growth is the aspiration,” says Dr. Eric Winograd, President-Elect of the Jewish Foundation of Manitoba. “We are looking toward building an asset base of \$200 million.”

To achieve that lofty goal, Winograd says that the Foundation needs to become even more sophisticated, responsive, and efficient.



“Donors everywhere are becoming more engaged and sophisticated in their philanthropic giving...”



“We’ve enjoyed great success and we have performed admirably for a long time,” he says. “We are now well-positioned to strategize for future growth and future impact.”

In early 2015, the JFM launched a comprehensive strategic planning process under the leadership of current President, Anita Wortzman. With the guidance of Strategic Philanthropy Inc., a leading Winnipeg-based philanthropy consultancy, the JFM studied best practice in foundation governance, fund development, community demographics, and trends in philanthropy.

“Donors everywhere are becoming more engaged and sophisticated in their philanthropic giving, so we need to become increasingly competitive,” says Wortzman. “They want to know that our costs are appropriate. They want to know that we are re-investing our income wisely. They want to know that we are distributing funds fairly and in

a way that has maximum impact. They want to know the charities they support are effective and well-run. I believe we are – and the strategic planning process will make us even stronger and more appealing to donors.”

The JFM strategic planning process, now in its implementation phase, focused on two key areas: fund development and governance.

On the governance side, the JFM has shrunk its Board and re-organized its committees. “We have a lot of smart people,” says Winograd, who will become President in June 2017. “We want to make sure that everyone can be heard and we want make better use of people’s expertise.”

On the fund development side, “we want to take even better care of our donors,” he says. “Today’s donors ask: ‘What possibilities are there for my money? Why should I trust you with it?’ We intend to provide increasingly compelling options for donors. They will feel recognized, and they will know they are getting good bang for the buck.”

Above all, says Winograd, the strategic planning process has been an important exercise in ensuring that the JFM continues to have a significant impact on the Jewish community and on all of Manitoba for the long term.

“We are well aware that our community is changing. With new immigration, changing family demographics, and evolving attitudes about community life, we know that our responsibilities will become more pronounced,” says Winograd. “We know that there will be strains on our organizations as they strive to adapt to changing times. That’s why it’s important that the JFM find ways to be successful. We are the safeguard of the community’s long-term well-being.”

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invited

2016

**ENDOWMENT
BOOK OF LIFE**

DONOR *Recognition* EVENING

*Featuring a special performance
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RAINBOWSTAGE

*A beautiful journey of love and inspiration
told through a collection of
Endowment Book of Life stories and song.*

**Tuesday, September 20, 2016
7:00pm**

**SHAAREY ZEDEK
SYNAGOGUE**

561 Wellington Crescent, Winnipeg, Manitoba

Cost: \$36

*Assigned seating. Party sandwiches
and light dessert served.*

Please RSVP by September 15, 2016

Email: rsvp@jewishfoundation.org

Telephone: 204.477.7520

US/Canada Toll-Free: 1.855.284.1918

New Look Luncheon

Women's Endowment Fund raises the bar

Nearly 500 people gathered at the Winnipeg Convention Centre on May 11 for the most successful JFM Women's Endowment Fund (WEF) luncheon in history.

Chaired by Jessica Cogan and Dianne Lieberman, the event raised \$70,000 for the WEF. The assets of the WEF now stand at \$1.4 million. Income from the fund supports organizations that help women of all backgrounds in Manitoba.

Lt. Governor Janice Filmon was the keynote speaker at the luncheon – an inspiring address rich with emotion, humour, and stories.



"This year's speaker, Janice Filmon, was outstanding and spoke to the values that the Foundation stands for. As well, it is always inspiring to see the women who are honored for their service to our community. All in all, an event that reminds us of what women can achieve."

GAYLE WAXMAN
Executive Director
Rady Jewish Community Centre

2016
**WOMEN'S ENDOWMENT
FUND LUNCHEON**



A) Her Honour the Honourable Janice Filmon, Lieutenant Governor of MB. **B)** Her Honour the Honourable Janice Filmon accompanied by His Honour the Honourable Gary Filmon are welcomed into the room. **C)** Heart and Stroke Foundation of Manitoba CEO Allison Kesler. **D)** (Top Row L-R): Ted Ransby, representing 2016 WEF Honouree Carolyn Ransby, JFM President Anita Wortzman, JFM CEO Marsha Cowan. (Bottom Row L-R): 2016 WEF Honouree Yhetta M. Gold, C.M., O.M., 2016 WEF Honouree Joanne Rothberg. **E)** JFM Treasurer Mark Lomow. **F)** (L-R): 2016 Co-Chair Dianne Lieberman, The Honourable Janice Filmon, 2016 Co-Chair Jessica Cogan.

Simkin Centre Receives Gift from Gray Academy Students

Youth in Philanthropy program is music to the ears

They study, they debate, and then they give. Each year, Grade 10 students at Gray Academy of Jewish Education distribute \$2,500 to community organizations as part of the Youth in Philanthropy (YIP) program, funded by the Jewish Foundation of Manitoba. This past year, the students supported eight organizations, including the Saul & Claribel Simkin Centre.

Through the Gemilut Chasadim course, students learn about various charities in Winnipeg. (Gemilut Chasadim translates as "the giving of loving-kindness.") Following a brainstorming session, each student selects a category of organization that interests them, for example, animal welfare, health, Jewish community, or poverty. Then, in small groups, students research a variety of organizations. Their work includes visiting the organizations and interviewing representatives of the organizations about what they do and what their needs are.

Students then make presentations to their classmates about what they have learned. After the presentations, the students debate how to distribute the money. It gets passionate and occasionally heated, says teacher Lawrence Goldstine, but ultimately the students arrive at a consensus.

"This is a real-world program, not a theoretical one, and the students take it very seriously," says Goldstine. "This is real money going to real organizations and it makes an impact on people's lives. The program gets us out of the school and exposes our students to the issues faced by organizations throughout Winnipeg."

One of the issues that moved the students this past year was the Simkin Centre's effort to enhance the lives of residents living with dementia. Specifically, the students provided funds to the Centre's new Music & Memory Program, which was initially established with a significant donation from a community member.

—☆—
"This is a real-world program, not a theoretical one, and the students take it very seriously."
—☆—

"We know that music can stimulate positive memories for people living with dementia," says Irwin Corobow, CEO of the Simkin Centre. "You can't overstate the role of music in long-term care."

The Simkin Centre has recently been certified as a Music & Memory site, and

staff have been trained to execute the program effectively. Customized playlists are carefully developed with residents and their families, and residents will use iPods and headphones to enjoy their selections. Corobow is happy to see the Music & Memory Program receive this additional funding, and he is happy to engage more deeply with Gray Academy and the JFM.

"The Foundation has been supportive of the Simkin Centre in many ways for many years," says Corobow. "And Gray Academy often sends students to sing for our residents for Jewish holidays. It's wonderful to have youth involved and we are grateful for their support."



Simkin Centre CEO Irwin Corobow accepts YIP Grant from Gray Academy students.

A Goal Within Reach

JFM Education Awards help Svetlana Chechelnitsky fulfil her dreams

As a young woman in Israel in the late 1990s, Svetlana Chechelnitsky dreamed of becoming a lawyer. That dream is finally about to come true.

She is entering her final year at the University of Manitoba, and already has an articling position lined up at Thompson Dorfman Sweatman LLP where she has been working as a summer student.

“I hope that one day
I will be on the
other side
of the table...”

In 1991, Chechelnitsky moved with her parents and sister from Uzbekistan to Nazareth Illit in northern Israel. The cost of pursuing a legal education in Israel was prohibitive, so she rose through the ranks of a technology company until she moved to Winnipeg in 2009. Her sister and her parents also moved here.

“I fell in love with Winnipeg. I would never leave,” she says. “I’ve learned that ‘Friendly Manitoba’ is more than a slogan.

The people here are wonderful. I see it in the Jewish community and I see it in my neighbourhood (Canterbury Park in Transcona).”

Chechelnitsky’s Canadian experience has had its share of challenges. Her partner Alex could not get his electrical engineering credentials recognized and needed to go back to school. The biggest setback, however, was her daughter Dasha’s fight with leukemia in 2011.

“She needed someone to be with her 24/7 at first, so I quit my job,” recalls Chechelnitsky. “We moved into my parents’ house to save money and for their help when I started going to school. I had to study at night by flashlight because Dasha was very sensitive to light while she recovered.”

Today, everything for Chechelnitsky and her family is nothing but light. Her children, Dasha and Roy, are healthy and happy; Alex is working as an engineer; and Svetlana herself is well on her way in a field she loves – thanks in part to the Education Awards she received from the Jewish Foundation in 2014 and 2016.

“I’m so grateful for my life here, and so grateful for the support of my spouse and children, my community, and the people I



Svetlana Chechelnitsky received JFM Education Awards in 2014 and in 2016: the Sharon & Mel Myers Award (2014); the Mark & Dorothy Danzker General Scholarship (2014 and 2016); the Dr. Philip & Edah Goldstein Scholarship (2016); and the Judge Charles N. Rubin Scholarship (2016).

work and study with,” she says. “They have all helped me make my dreams come true.”

And she is grateful to the JFM for the Education Awards. While the scholarship money she received was helpful, the impact of the awards goes much deeper than dollars and cents.

“It makes me feel good that strangers who don’t even know me have acknowledged my efforts,” she says. “I hope that one day I will be on the other side of the table and I will be the one helping students like me.”

The **BERVIN** Effect

Community Organizations Profit from Powerful Incentive Fund

Established in 2014, BERVIN is an initiative to provide an incentive to Jewish organizations to grow their endowment funds. BERVIN is funded by the Berdie & Irvin Cohen (BERVIN) Organizational Endowment Incentive Fund, which donated \$1 million to this unique initiative.

When a participating Winnipeg Jewish organization adds \$720,000 to its new or existing organizational endowment fund, it triggers a \$108,000 incentive contribution from BERVIN. Additionally, once an organization reaches the \$1 million mark in new money, they earn the right to withdraw from their fund in the event of a ‘rainy day’ or special project.

“JCFS, as an agency that has fully availed itself of the BERVIN Incentive, is so thankful for this innovative and creative philanthropy. BERVIN served as a powerful incentive to JCFS to maximize our fundraising efforts in order to grow the JCFS Endowment Fund at the Jewish Foundation to new heights. This will ensure our sustainability to provide important social services in our community for years to come.”

AL BENARROCH

Executive Director, Jewish Child and Family Service

“The establishment of the JNF’s Future Generation Development Program with BERVIN will help our organization to educate more Manitobans about JNF and about Israel and to develop a future generation of local leaders.”

ARIEL KARABELNICOFF

Executive Director, Jewish National Fund Manitoba/Saskatchewan

Does your organization want to realize the BERVIN effect? Contact Marsha Cowan, Chief Executive Officer, by telephone at 204.477.7520 or toll-free from the US/Canada at 1.855.284.1918 or by email at mcowan@jewishfoundation.org.



Board Member Spotlight

“I eagerly accepted an invitation to serve on a JFM subcommittee a few years ago and was impressed by what I saw – a talented board, a diligent staff, passionate donors, and a growing, well-managed asset base. After being involved with a number of wonderful charities in the general community – and I still am active with Agape Table – I was excited to engage with a Jewish organization. My wife, kids, and I are proud of our community, our faith, and our culture. Serving the Foundation as Chair of the Investment Committee is a privilege and a great responsibility that I take very seriously. I’m grateful that Ceci Gorlick and Marsha Cowan invited me; and grateful for Howard Morry’s leadership of the Committee before me. I also thank Steve Kroft, Jeff Norton, and Ian Barnes, among others, for their support and mentorship. Thanks to the JFM’s volunteers and leading professionals, we are well-positioned to have a tremendous impact on the Jewish and wider community for a long time.”



AARON MARGOLIS
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kol hakavod!

New JFM Funds in Past Six Months

The Jewish Foundation would like to recognize all of our new funds that have been opened between December 1, 2015, to May 31, 2016. On behalf of the JFM Board of Directors, thank you for your commitment and generosity.

ORGANIZATIONAL ENDOWMENT FUNDS

Fraser, Marla, Lee & Ben Aronovitch Fund (BB CAMP)

Sheldon & Penny Bowles Fund (BB CAMP)

Joel Donen & Brenda Tessler and Family Fund (BB CAMP)

Sandra Kliman & Jeff Norton Fund (BB CAMP)

Michael Nozick Family Fund (BB CAMP)

Sprintz Family Fund (CAMP MASSAD)

Ami Bakerman & Rebeca Kuropatwa and Calia Fund (MAGEN DAVID ADOM)

Beauty Field Tours to Israel Fund (MAGEN DAVID ADOM)

Daniel & Kayla Plantz Fund (MAGEN DAVID ADOM)

Gomer & Dorothy Plantz Fund (MAGEN DAVID ADOM)

John, Irene, Michael and Bethaney Plantz Fund (MAGEN DAVID ADOM)

Joshua & Sophia Plantz Fund (MAGEN DAVID ADOM)

Mathew Plantz & Family Fund (MAGEN DAVID ADOM)

Seth, Beth, Karliah and Tobias Plantz Fund (MAGEN DAVID ADOM)

In memory of John & Janice Thiessen Fund (MAGEN DAVID ADOM)

Arnold & Ruth Voth and Andrew Voth Fund (MAGEN DAVID ADOM)

Joel & Sharron Dudeck Fund (CHABAD LUBAVITCH)

Class of '16 Fund (GRAY ACADEMY)

Class of '91 Fund – In memory of Adam Anhang z”l (GRAY ACADEMY)

Sandy, Diane and Annie Shindleman Fund (GRAY ACADEMY)

Dolly & Lawrence Cohen Fund (JCFS)

Larry & Tova Vickar Fund (JNF)

Sara Hochman Music Therapy Endowment Fund (SIMKIN CENTRE)

DESIGNATED AND UNDESIGNATED FUNDS

Clara & Lou Bernstein Family Fund

Meira & Abe Buchszreiber Fund

Colette & Louis Rubin Fund

Bob Silver Family Fund

Earl & Cheryl Barish Fund

WOMEN’S ENDOWMENT FUNDS

Morgan Biggs Fund

Jodi Hyman Fund

Verna Johnson, Natalia Sousa, Jeffrey Thoroski Wealth Management Fund

Adrienne Katz
In memory of Mae Bubis Fund

Dianne Lieberman Fund

Bonnie Robinson Fund

Ruth Shell Memorial Fund

Yael Silver Fund

Charlotte Sytnyk Fund

Leya Tapper Fund

Brenlea Yamron Fund

Karen Yamron-Shpeller Fund

BAR/BAT MITZVAH ENDOWMENT FUNDS

Shirley Sue Ransby Bat Mitzvah Fund

Ella Braunstein Bat Mitzvah Fund

Adam Kroft Bar Mitzvah Fund

Would you like to open a new fund? Contact Rob Berkowitz, Director of Development & Gift Planning, by email at rob@jewishfoundation.org or by telephone at 204.477.7522 or toll-free from the US/Canada at 1.855.284.1918.

Questions or comments about the Focus? Contact Zachary R. Minuk, Director of Marketing & Communications, by email at zminuk@jewishfoundation.org or by telephone at 204.477.7520 or toll-free from the US/Canada at 1.855.284.1918.