# Board of Directors Meeting
# Thursday, August 20, 2026
# 5:30 p.m.
# AGENDA

| | | |
|---|---|---|
| I. | Welcome and Approval of Minutes | Rosann Bocciarelli |
| II. | Committee Reports | |
| | 1. Finance Committee | Jeff Levin |
| | 2. Investment Committee | Eric Shoenfeld |
| | 3. Grants Committee Report | Jessica Samet |
| | 4. Development Committee Report | Dan Brandeis |
| III. | Chair's Report | Rosann Bocciarelli |
| | 1. Discussion of Proposed Board Goals | |
| IV. | CEO's Report | Dan Brandeis |
| | 1. CFO Updates | |
| | 2. Legacy Plus Updates | |
| V. | Executive Session | Rosann Bocciarelli |
| VI. | Adjournment | Rosann Bocciarelli |

Upcoming Meetings

August 27, 2026 – Board of Directors Training at Hirshler @ 4 PM
September 17, 2026 – Grants Committee @ 1:30 PM – Virtual
October 6, 2026 – Development Committee Meeting @ 12 PM - Virtual
October 15, 2026 – Investment Committee Meeting @ 11:45 AM
October 27, 2026 – Finance Committee Meeting @ 12 PM
November 3, 2026 – Executive Committee Meeting @ 12 PM
November 12, 2026 – Board of Directors Meeting @ 5:30 PM

**BOARD OF DIRECTORS MEETING MINUTES - DRAFT**
**June 18, 2026**

**Attendance**:

**Directors**: Ellen Renee Adams, Millie Becker, Scott Belleman, Maury Bricks, Rosann Bocciarelli, Ron Felmus-Chair, Kevin Fine, Janet Gale, Brian Greene, Howard Goldfine, Jeff Lacker, Jeff Levin, Julie Mullian, Katie Roeper, Rachel Safren, Jessica Samet, Lynn Schwartz, Eric Shoenfeld, Sara Waskin, and John Weinberg

**Staff**: Dan Brandeis, Liz Garrison, Lauren Plotkin, and Tami Powell

**Welcome and Approval of Minutes: Ron Felmus**
Meeting called to order at 5:35 p.m.

Upon motion duly made and seconded, the Board approved the Agenda for the meeting as well as minutes from the prior Board meeting as presented.

Ron solicited feedback regarding the joint annual meeting. The consensus was that the joint annual meeting with the Federation, JFS, RTA, and BSH was good for the community and the Foundation, and it was recommended that RJF consider participating again next year. Dan Brandeis gave an update on Legacy Plus, noting that at least eight individuals had expressed interest in participating but that, to date, only one endowment had been secured.

Ron announced a proposed change to the meeting calendar for the May 20, 2027 Board of Directors meeting, which conflicts with the WJCC Annual Meeting. The suggestion was to hold this meeting, which will focus on reviewing the upcoming budget, calendar, and slate, by Zoom during the lunch hour. There were no objections; therefore, the May 20, 2027 meeting will now take place at noon by Zoom.

Dan thanked all of the Board members for their service. He also introduced and thanked the professional staff noting each of their roles at the Foundation. Dan gave an overview of the achievements of the Foundation during the fiscal year highlighting $8.5 million in additions.

The meeting was adjourned.

**Committee Reports for**
**Board Meeting - August 20, 2026**

**Finance Committee -** The Finance Committee met on July 28, 2026, and reviewed results for FY2026. The Foundation ended the fiscal year in a strong financial position, with total assets increasing by more than $11 million and operating results slightly ahead of budget. These positive results were achieved despite additional expenses related to staff turnover and technology investments. The Committee also discussed ongoing risk management initiatives and preparations for the upcoming audits (YE2025 and YE2026).

**Investment Committee -** Return on Long-Term Account

- Second Quarter: 9.3% versus Benchmark of 10.1%.
- Year-to-Date: 8.9% versus benchmark of 8.6%

The Investment Committee met on July 16, 2026, to review strong fiscal year results, including solid investment performance, approximately $8.8 million in contributions, $6 million in community grants, and total assets under management of approximately $72 million. The Committee confirmed that current portfolio management remains aligned with the Investment Policy Statement; no IPS changes were approved.

**Grants Committee -** As of August 11, 2026, RJF has awarded more than $3.8 million to charitable organizations locally and nationally, including grants through DAFs, tax credit scholarships, special purpose and endowment funds, agency funds, Life & Legacy incentive grants, and field-of-interest grants. Demand for community grants continues to exceed available funding by more than two-to-one, prompting ongoing efforts to encourage donor support of existing grantmaking funds.

RJF is now accepting fall grant applications for Holocaust Education and Tolerance/Human Rights programs and Shor Hillel Fund grants. Deadlines are August 21, 2026 for Hillel requests and September 4, 2026 for fall grant applications. The Grants Committee will meet again on September 17, 2026, at 1:30 PM via Zoom to review applications. New Directors are welcome to attend. Contact Liz for the Zoom link.

**Development Committee -** The Committee met on May 19, 2026, to review several key initiatives, including development progress, the continued momentum of the Life & Legacy program, donor recognition opportunities, and marketing strategies for the Legacy Plus Endowment Matching Grant. Final campaign materials were prepared for launch in conjunction with the June 3 Annual Meeting.

Katie Roeper partnered with staff to develop and implement a marketing plan designed to increase awareness of the Legacy Plus matching opportunity and highlight the importance of endowments within the community. Outreach efforts have included targeted email campaigns, collaboration with community partners, and a direct-mail postcard campaign.

**RJF Financial Snapshot**

**For Period Ending June 2026**

# Overall

**The Foundation finished the fiscal year in a strong financial position. Total assets increased more than $11 million year over year, driven by investment appreciation and positive net inflows. Operating results finished essentially at break-even and in line with the approved budget with several one-time investments in technology and staffing transition during the year.**

# Financial Position (vs Prior Year)

| Metric | FY26 YTD | FY25 YTD | CHANGE |
|---|---|---|---|
| Total Assets | 72M | 60.7M | 11.3M |
| Net Inflows | 1.68M | (.325M) | 2M |
| Net Investment Return | | | |
| Long Term Pool | 19.90% | 11.60% | 8.3% |
| Net Results | 2K | - | 2K |
| Total Revenue | 715K | 663K | 52K |
| Total Expenses | 713K | 663k | (50K) |

**Richmond Jewish Foundation**
**Statement of Financial Position**
**As of June 30, 2026**

| | 6/30/2026 | 6/30/2025 | Change |
|---|---|---|---|
| Assets | | | |
| Cash | | | |
| Wells Fargo Checking | $ 217,307 | $ 223,169 | $ (5,862) |
| Investment Assets | | | |
| Gift Account | 32 | 107,130 | (107,098) |
| Long Term Investment Portfolio | 60,264,690 | 45,921,349 | 14,343,341 |
| Short Term Investment Portfolio [1] | 667,800 | 1,243,601 | (575,801) |
| Charitable Trusts | 3,597,530 | 3,203,698 | 393,832 |
| Truist/Markel Investments FMV | 425,756 | 586,216 | (160,460) |
| Schwab - TBE | 5,935,054 | 5,231,022 | 704,032 |
| Liquid Fund [1] | 350,716 | 3,626,182 | (3,275,466) |
| Other temporary funds | - | 1,248 | (1,248) |
| | 71,241,579 | 59,920,446 | 11,321,133 |
| Accounts Receivable | - | 3,393 | (3,393) |
| Other Assets | | | |
| Life Insurance | 449,148 | 577,131 | (127,983) |
| Annuities | 26,231 | 26,231 | (0) |
| Fixed Assets | 48,779 | 43,536 | 5,243 |
| Fixed Assets-Accu Depr | (30,295) | (23,092) | (7,203) |
| | 493,863 | 623,806 | (129,943) |
| **Total Assets** | **$ 71,952,749** | **$ 60,770,814** | **$ 11,181,934** |
| Liabilities | | | |
| Other Current Liabilities | | | |
| Accounts Payable | 45,908 | 53,820 | (7,912) |
| Other Liabilities | 2,000 | 71,443 | (69,443) |
| | 47,908 | 125,263 | (77,355) |
| Net Assets | | | |
| Net Assets | 71,904,842 | 60,645,551 | 11,259,291 |
| **Total Liabilities + Net Assets** | **$ 71,952,749** | **$ 60,770,814** | **$ 11,181,936** |

1 The decrease in the Short Term Investment Portfolio and Liquid Fund reflects the reallocation of the Beth Sholom funds from the these funds to the Long-Term Investment Pool in accordance with donor investment elections.

**RJF - Genesis**

**Comparative Statement of Activities**

**For the Twelve Months Ended 6/30/2026**

| | Actual YTD 6/30/2026 | Budget YTD 6/30/2026 | Favorable / (Unfavorable) to Budget | | Actual YTD 06/30/2025 | Favorable / (Unfavorable) to Prior Year |
|---|---|---|---|---|---|---|
| **Revenue** | | | | | | |
| Genesis 5% Spendable | $ 172,690 | $ 180,000 | $ (7,310) | | $ 176,588 | $ (3,898) |
| Grants Life & Legacy | 40,000 | 37,000 | 3,000 | | 48,598 | (8,598) |
| Admin. Fees Earned | 497,128 | 440,000 | 57,128 | 1 | 455,483 | 41,645 |
| Contributions | 200 | 1,000 | (800) | | 600 | (400) |
| Sponsor Contribution | 5,000 | 5,000 | - | | 1,000 | 4,000 |
| **Total Revenue** | **$ 715,018** | **$ 663,000** | **$ 52,018** | | **$ 682,269** | **$ 32,748** |
| **Expenses** | | | | | | |
| Meetings/Special Events | $ 9,046 | $ 4,000 | $ (5,046) | 2 | $ 1,391 | $ (7,655) |
| Office Supplies | 3,946 | 3,500 | (446) | | 2,811 | (1,135) |
| Computer/Laser Printer | 671 | 7,500 | 6,829 | 3 | 1,537 | 866 |
| Photography/Printing | 2,512 | - | (2,512) | 4 | 880 | (1,632) |
| Publications | 217 | 400 | 183 | | 8 | (209) |
| Telephone | 550 | 600 | 50 | | 1,880 | 1,330 |
| Postage | - | 180 | 180 | | - | - |
| Professional Fees | 19,138 | 18,000 | (1,138) | | 23,453 | 4,315 |
| Professional Conferences | - | - | - | | - | - |
| Office Occupancy - JCFR | 34,726 | 33,170 | (1,556) | | 38,698 | 3,972 |
| JFNA Dues-JCFR | - | 2,500 | 2,500 | | - | - |
| Life and Legacy Expense | 15,340 | 20,000 | 4,660 | 5 | 21,831 | 6,491 |
| Insurance | 8,399 | 8,000 | (399) | | 4,486 | (3,913) |
| Marketing | 15,715 | 16,000 | 285 | | 19,552 | 3,837 |
| Computer/Software Consulting | 52,925 | 42,000 | (10,925) | 6 | 35,004 | (17,921) |
| Genesis Fund Misc Expenses | 3,025 | 2,000 | (1,025) | | 1,230 | (1,795) |
| Depreciation | 7,203 | 6,500 | (703) | | 8,076 | 873 |
| Taxes & License fees | 325 | 325 | - | | - | (325) |
| | $ 173,739 | $ 164,675 | $ (9,064) | | $ 160,838 | $ (12,902) |
| Payroll Expense: | | | | | | |
| Salaries | $ 462,265 | $ 432,200 | $ (30,065) | 7 | $ 338,531 | $ (123,734) |
| Temporary Labor | 32,631 | 15,000 | (17,631) | 8 | 105,858 | 73,227 |
| Fringe Benefits | 11,718 | 17,598 | 5,880 | 9 | 25,070 | 13,352 |
| Payroll Taxes | 32,573 | 33,063 | 490 | | 21,735 | (10,838) |
| | $ 539,188 | $ 497,861 | $ (41,327) | | $ 491,194 | $ (47,994) |
| **Total Expenses** | **$ 712,926** | **$ 662,536** | **$ (50,390)** | | **$ 652,032** | **$ (60,895)** |
| **Net** | **$ 2,091** | **$ 464** | **$ 1,627** | | **$ 30,237** | **$ (28,147)** |

# Richmond Jewish Foundation
## Contributions/Distributions Summary
## 6/30/2026

**Grantmaking and philanthropic activity remained strong throughout the year, with both contributions and distributions significantly exceeding the prior year.**

| | FYE 6/30/2026 YTD 06/30/2026 | FYE 6/30/2025 | FYE 6/30/2024 | FYE 6/30/2023 | FYE 6/30/2022 | FYE 6/30/2021 |
|---|---|---|---|---|---|---|
| **Contributions** | | | | | | |
| Genesis Fund (includes Sponsor Contr.) | 347,061 | 605,762 | 61,321 | 9,223 | 22,777 | 20,223 |
| Endowments (SPF) | 1,052,842 | 265,975 | 625,636 | 811,797 | 395,774 | 788,459 |
| Donor-Advised Funds | 3,909,243 | 1,565,422 | 1,870,387 | 3,680,413 | 522,625 | 1,245,315 |
| **Sub Total Contributions** | **5,309,145** | **2,437,159** | **2,557,343** | **4,501,433** | **941,176** | **2,053,997** |
| Contributions-Agency (FHFO) | 2,993,070 | 645,072 | 4,996,354 | 2,420,880 | 1,904,498 | 2,277,311 |
| **Total-All Contributions** | **8,302,215** | **3,082,231** | **7,553,697** | **6,922,313** | **2,845,674** | **4,331,308** |
| **Distributions** | | | | | | |
| Genesis Fund | 19,354 | 122,000 | 24,596 | 60,322 | 195,093 | 81,938 |
| Endowments (SPF) | 1,285,502 | 702,780 | 578,902 | 974,644 | 940,894 | 964,644 |
| Donor-Advised Funds | 3,652,504 | 1,867,532 | 1,744,968 | 1,259,039 | 1,297,721 | 1,453,154 |
| **Total Foundation Distributions** | **4,957,360** | **2,692,312** | **2,348,465** | **2,294,006** | **2,433,708** | **2,499,736** |
| Distributions-Agency (FHFO) | 1,666,280 | 715,368 | 1,787,185 | 4,321,385 | 3,494,757 | 569,864 |
| **Total-All Distributions** | **6,623,640** | **3,407,680** | **4,135,650** | **6,615,390** | **5,928,465** | **3,069,600** |
| **NET** | **1,678,575** | **(325,450)** | **3,418,047** | **306,923** | **(3,082,791)** | **1,261,708** |

**RJF**
**Key Variance Explanations**
**Year to Date 6/30/2026**

1 Admin fees are above budget for the year due to investment performance and net positive inflows, which increased the asset base and resulted in higher fee generation than projected.

2 Meetings expense exceeded budget primarily due to costs associated with the joint annual meeting, Foundation annual meeting, and committee meetings.

3 Computer and printer equipment expense was below budget because anticipated equipment purchases were not required during the year.

4 Photography and printing expense was unbudgeted and reflects one-time costs associated with updating and reprinting organizational stationery materials, including letterhead and envelopes.

5 Life & Legacy expenses were below budget primarily due to lower-than-anticipated event-related expenditures during the year.

6 Computer/software consulting is unfavorable to budget due to one-time projects, including the Microsoft migration and website redesign and build, which were not included in the original budget.

7 Salaries are over budget due to staffing change during the year, including costs associated with the executive assistant and CFO transitions, as well as a CEO salary increase that was not incorporated in the original budget.

8 Temporary labor is above budget due to costs for interim CFO support during the staffing transition, which were higher than originally anticipated.

9 Fringe benefits are below budget as medical insurance costs were included in the budget but ultimately not utilized by staff.

# Long Term Performance Dashboard – 06/30/2026

## Richmond Jewish Foundation - Long Term Account

| | Month | QTR | YTD | 1 Year | 3 Year | 5 Year | Since Inception[2] |
|---|---|---|---|---|---|---|---|
| **FEG Composite[3]** | **-0.3%** | **9.3%** | **8.9%** | **19.9%** | **14.6%** | **-** | **13.6%** |
| *Target Weighted Benchmark[1]* | *-0.3* | *10.1* | *8.6* | *17.9* | *14.8* | *-* | *13.7* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception** |
| **Historical Composite** | **-0.3%** | **9.0** | **8.6** | **18.9** | **15.3** | **9.8** | **9.1** |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception[2]** |
| **Historical Composite less Private Capital** | **-0.3%** | **9.4** | **9.0** | **19.9** | **14.6** | **-** | **13.2%** |
| *Target Weighted Benchmark[1]* | *-0.3* | *10.1* | *8.6* | *15.6* | *14.8* | *-* | *14.1* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception[2]** |
| **Global Equity** | **-0.6%** | **14.1** | **12.7** | **27.7** | **20.0** | **-** | **19.2%** |
| *MSCI All Country World IMI Index* | *-0.6* | *14.9* | *11.8* | *24.2* | *19.5* | *-* | *18.6* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception[2]** |
| **Global Fixed Income** | **0.3%** | **0.6** | **0.5** | **3.6** | **4.3** | **-** | **3.2%** |
| *Barclays U.S. Aggregate Index* | *0.2* | *0.7* | *0.6* | *3.8* | *4.2* | *-* | *2.9* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception[2]** |
| **Real Assets** | **-1.8%** | **2.3** | **10.7** | **23.1** | **14.8** | **-** | **12.6%** |
| *S&P Real Assets Eq. TR Index* | *-0.6* | *1.8* | *10.1* | *16.3* | *11.6* | *-* | *8.6* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception[2]** |
| **Diversifying Strategies** | **0.9%** | **5.2** | **5.0** | **9.1** | **2.3** | **-** | **1.7%** |
| **FEG Select Diversifying Strategies** | **0.9%** | **5.3** | **5.1** | **-** | **-** | **-** | **6.4%** |
| *HFRI FOF Conservative Index* | *0.3* | *3.4* | *4.6* | *-* | *-* | *-* | *6.3* |

[1]Target Weighted Benchmark is comprised of: 5.0% HFRI FOF Conservative Index, 5.0% S&P Real Assets Equity Total Return Index, 65.0% MSCI AC World IMI Index, and 25.0% Bloomberg U.S. Aggregate Index

[2]Since inception is July 2022

[3]FEG Composite does not include legacy holdings

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# Short Term Performance Dashboard – 06/30/2026

## Richmond Jewish Foundation - Short Term Account

| | Month | QTR | YTD | 1 Year | 3 Year | 5 Year | Since Inception |
|---|---|---|---|---|---|---|---|
| **Total Composite** | **0.0%** | **5.2%** | **4.8%** | **11.8%** | **9.6%** | **-** | **-** |
| *Target Weighted Benchmark*[1] | *0.0* | *5.9* | *4.8* | *11.1* | *9.7* | *-* | *6.0* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception**[2] |
| **Global Equity** | **-0.7%** | **13.9%** | **12.6%** | **27.4%** | **20.0%** | **-** | **19.1%** |
| *MSCI All Country World IMI In* | *-0.6* | *14.9* | *11.8* | *24.2* | *19.5* | *-* | *18.6* |
| | **Month** | **QTR** | **YTD** | **1 Year** | **3 Year** | **5 Year** | **Since Inception**[2] |
| **Global Fixed Income** | **0.4%** | **0.7%** | **0.5%** | **3.7%** | **4.3%** | **-** | **3.2%** |
| *Barclays U.S. Aggregate Inde* | *0.2* | *0.7* | *0.6* | *3.8* | *4.2* | *-* | *2.9* |

[1]Target Weighted Benchmark is comprised of: 35.0% MSCI AC World Index, and 65.0% Bloomberg U.S. Aggregate Index.

[2]Since inception is July 2022

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# RJF Grants Committee Grants Report
# January 1 - August 11, 2026

I. **DAFs**

| | CURRENT | | AMOUNT |
|---|---|---|---|
| **LOCAL JEWISH** | | | |
| Beth Ahabah Museum and Archives | 1 | $ | 1,000 |
| B'nai B'rith Youth Organization | 1 | $ | 1,800 |
| Capital Camps and Retreat Center | 1 | $ | 25,000 |
| CBA - Congregation Beth Ahabah | 9 | $ | 33,290 |
| Chabad of Virginia | 2 | $ | 1,881 |
| Friends of Chevra Thelim Inc. | 1 | $ | 500 |
| Friends of JCC Krakow | 1 | $ | 1,000 |
| Friendship Circle of Virginia | 11 | $ | 10,410 |
| Genesis Fund | 1 | $ | 180 |
| Hillel at VCU | 6 | $ | 21,970 |
| JCFR - Jewish Community Federation of Richmond | 25 | $ | 192,862 |
| Jewish Life at VCU | 4 | $ | 2,205 |
| JFS - Jewish Family Services | 4 | $ | 660 |
| KBI - Keneseth Beth Israel | 4 | $ | 7,700 |
| Or Ami - Congregation Or Ami | 3 | $ | 8,800 |
| Or Atid - Congregation Or Atid (Richmond, VA) | 3 | $ | 6,742 |
| Richmond Free Loan Fund | 2 | $ | 360 |
| RTA - Rudlin Torah Academy | 10 | $ | 99,272 |
| Temple Beth Ami | 1 | $ | 4,480 |
| TBE - Temple Beth El | 16 | $ | 78,795 |
| VHM - Virginia Holocaust Museum | 2 | $ | 350 |
| Weinstein JCC | 17 | $ | 63,020 |
| Yeshiva of Virginia | 3 | $ | 13,500 |
| Total | 128 | $ | 575,777 |
| **NATIONAL JEWISH ORGANIZATIONS** | | | |
| Aishel House | 2 | $ | 2,000 |
| Aish Global | 2 | $ | 973 |
| America Gives, Inc. | 1 | $ | 360 |
| American Friends of Magen David Adom | 1 | $ | 2,500 |
| American Friends of Netiv Aryeh Inc | 1 | $ | 20,000 |
| American Jewish Joint Distribution Committee, Inc | 4 | $ | 7,957 |
| Birthright Israel Foundation | 1 | $ | 500 |
| BSBI Synagogue | 2 | $ | 1,113 |
| Center for Initiatives in Jewish Education (CIJE) | 1 | $ | 6,500 |
| Friends of Sir M B Davis Jewish General Hospital | 1 | $ | 5,000 |
| Hadassah | 2 | $ | 2,000 |
| Hadassah - Keepers | 1 | $ | 4,000 |

| | CURRENT | | AMOUNT |
|---|---|---|---|
| **NATIONAL JEWISH ORGANIZATIONS Con't.** | | | |
| Halacha Education Center | 1 | $ | 540 |
| Hillel at Virginia Tech | 1 | $ | 300 |
| Hoffberger Fund for Biblical Studies LTD | 1 | $ | 1,800 |
| Israel Guide Dog Center | 1 | $ | 288 |
| Jewish Center for Justice | 1 | $ | 250 |
| Jewish Educational Loan Fund | 1 | $ | 1,800 |
| Jewish Federation Bay Area | 2 | $ | 5,180 |
| Jewish National Fund | 1 | $ | 500 |
| JGive Friends of Asor Fund USA, Inc. | 1 | $ | 5,000 |
| Milwaukee Kollel | 1 | $ | 1,200 |
| Missouri Torah Institute | 1 | $ | 2,018 |
| NCSY Baltimore | 1 | $ | 288 |
| Project Inspire Inc | 1 | $ | 136 |
| Rabbinical Seminary of America | 1 | $ | 2,500 |
| Red Tent Fund | 1 | $ | 1,000 |
| The Chesed Fund | 1 | $ | 100 |
| Torah Academy of Milwaukee | 2 | $ | 4,300 |
| US Holocaust Memorial Museum | 1 | $ | 500 |
| Yeshiva Elementary School | 2 | $ | 6,200 |
| Yeshiva Keren HaTorah of Passaic Clifton | 1 | $ | 1,000 |
| Yeshiva of South Bend | 1 | $ | 613 |
| Zaka North Inc | 1 | $ | 1,000 |
| Total | 44 | $ | 89,416 |
| | | | |
| **LOCAL NON-JEWISH ORGANIZATIONS** | | | |
| ALS Association | 1 | $ | 150 |
| American University Radio | 1 | $ | 500 |
| Blue Sky Fund | 1 | $ | 5,000 |
| Bon Secours Richmond Health Care Foundation | 4 | $ | 140,000 |
| Boys and Girls Club of Metro Richmond | 4 | $ | 6,450 |
| Collegiate School | 1 | $ | 2,500 |
| Common Cause Education Fund | 1 | $ | 10,000 |
| Communities in School of Richmond, VA | 1 | $ | 100 |
| Community Tax Law Project | 1 | $ | 1,000 |
| Feed More | 2 | $ | 18,250 |
| For the Love of Poodles & Pooches Rescue of Richmond | 1 | $ | 20,000 |
| Friends of James River Park | 1 | $ | 360 |
| Goochland Cares | 1 | $ | 250 |
| Grace Reproductive Fund | 1 | $ | 10,000 |
| Groundwork RVA | 1 | $ | 2,000 |
| Homes for America | 1 | $ | 5,000 |
| Impact 100 of Richmond Virginia | 2 | $ | 1,700 |
| Junior Achievement | 1 | $ | 180 |
| Maymont Foundation | 1 | $ | 500 |

| | CURRENT | | AMOUNT |
|---|---|---|---|
| **LOCAL NON-JEWISH ORGANIZATIONS Con't** | | | |
| New Virginia Majority Education Fund | 1 | $ | 10,000 |
| Omicron Delta Kappa Society and Educational Foundation, In | 1 | $ | 100 |
| Planned Parenthood Federation of America | 1 | $ | 1,000 |
| Richmond Free Loan Fund | 1 | $ | 10,000 |
| Sacred Heart Center | 1 | $ | 250 |
| Sheltering Arms Foundation | 1 | $ | 250 |
| SPARC | 2 | $ | 2,600 |
| St. James Episcopal Church | 3 | $ | 10,500 |
| St. Stephen's Episcopal Church | 2 | $ | 852 |
| The Steward School | 1 | $ | 500 |
| Tuckahoe Volunteer Rescue Squad | 1 | $ | 200 |
| UP RVA | 1 | $ | 500 |
| USO | 1 | $ | 500 |
| University of Virginia Law School Foundation | 1 | $ | 2,500 |
| Valentine Museum Development Office | 1 | $ | 40,000 |
| Virginia Center for Inclusive Communities | 3 | $ | 10,180 |
| Virginia Interfaith Center for Public Policy | 1 | $ | 10,000 |
| Virginia Museum of Fine Arts Foundation | 1 | $ | 2,500 |
| VPM | 1 | $ | 500 |
| Wikimedia Foundation | 1 | $ | 100 |
| Worsham Cats | 1 | $ | 10,000 |
| WVTF & Radio IQ | 1 | $ | 100 |
| YWCA OF RICHMOND | 1 | $ | 100 |
| Total | 56 | $ | 337,172 |
| | | | |
| **NATIONAL NON-JEWISH ORGANIZATIONS** | | | |
| Alzheimer's Association | 1 | $ | 100 |
| American Cancer Society | 1 | $ | 100 |
| American Heart Association (Glen Allen, VA) | 1 | $ | 100 |
| American Red Cross- (Greater Richmond Chapter) | 1 | $ | 100 |
| Anti-Defamation League | 1 | $ | 5,000 |
| ASK Childhood Cancer Foundation | 1 | $ | 1,000 |
| Ayla's Acres | 3 | $ | 460,000 |
| Best Richardson African Diaspora Literature & Culture Museu | 1 | $ | 10,000 |
| Blood Cancer United (formerly LLS) | 4 | $ | 25,330 |
| Bright Focus Foundation | 1 | $ | 500 |
| Cat Haven Rescue Inc. | 1 | $ | 20,000 |
| Children's Advocacy Center | 1 | $ | 1,200 |
| Cocoa Packs, Inc. | 1 | $ | 180 |
| DAFpay Network | 2 | $ | 1,180 |
| DAV Charitable Service Trust | 1 | $ | 12,000 |
| Doctors Without Borders | 1 | $ | 200 |
| For the Love of Poodles & Pooches Rescue of Richmond VA | 1 | $ | 40,000 |
| George C. Marshall Research Foundation | 1 | $ | 500 |

| | CURRENT | | AMOUNT |
|---|---|---|---|
| **NATIONAL NON-JEWISH ORGANIZATIONS Con't** | | | |
| Interstitial Cystitis Association | 1 | $ | 1,000 |
| Lake Forest College | 1 | $ | 500 |
| Masonic Villages of the Grant Lodge of Pennsylvania | 1 | $ | 100 |
| Meals on Wheels Montgomery County | 1 | $ | 360 |
| Medical College of Virginia Foundation | 1 | $ | 1,800 |
| Metropolitan Golf Association Foundation | 1 | $ | 3,600 |
| Parkinson's Foundation | 1 | $ | 500 |
| Paws for Purple Heart | 1 | $ | 300 |
| Pelotonia | 1 | $ | 100 |
| Shriners Hospital for Children | 1 | $ | 500 |
| St. Jude Children's Research Hospital, Inc. | 1 | $ | 500 |
| The Connecticut Golf Foundation | 1 | $ | 250 |
| University of Georgia Foundation | 1 | $ | 100 |
| University of Virginia | 1 | $ | 100 |
| University of Virginia (Rectors and Visitors) | 1 | $ | 12,000 |
| WGCU Public Radio | 1 | $ | 2,500 |
| World Central Kitchen | 1 | $ | 1,000 |
| Wounded Warrior Project | 2 | $ | 400 |
| Young Americas Foundation | 1 | $ | 1,000 |
| Total | 44 | $ | 604,100 |
| **Total DAF Recommendations** | **272** | **$** | **1,606,465** |

**II. SPECIAL PURPOSE GRANT RECIPIENTS**

| | | | |
|---|---|---|---|
| Aleph Bet Preschool | 2 | $ | 2,011 |
| American Friends of Magen David Adom | 1 | $ | 21 |
| American Jewish Joint Distribution Committee, Inc | 1 | $ | 1,274 |
| American Society for Yad Vashem | 1 | $ | 21 |
| BBYO Washington | 2 | $ | 2,696 |
| Bnos Ruach Chaim | 1 | $ | 2,000 |
| Brith Achim Cemetery Corporation | 1 | $ | 10,051 |
| CAMERA | 1 | $ | 21 |
| Camp Bonim | 2 | $ | 1,000 |
| Camp Menuchah | 1 | $ | 1,000 |
| Camp Nageela | 1 | $ | 2,000 |
| Camp Sternberg | 1 | $ | 1,000 |
| Camp Tal | 1 | $ | 500 |
| CBA - Congregation Beth Ahabah | 1 | $ | 3,821 |
| FINCA International | 1 | $ | 637 |
| Friends Association for Children | 1 | $ | 493 |
| Genesis Fund | 2 | $ | 3,842 |
| Hadassah | 2 | $ | 851 |
| Hanover Education Foundation | 1 | $ | 10,000 |

| | CURRENT | | AMOUNT | |
|---|---|---|---|---|
| **SPECIAL PURPOSE GRANT RECIPIENTS Con't** | | | | |
| Hillel at VCU | 1 | $ | 8,600 | |
| JCFR - Jewish Community Federation of Richmond | 27 | $ | 455,693 | |
| Jerusalem Foundation | 1 | $ | 21 | |
| JFS - Jewish Family Services | 1 | $ | 2,307 | |
| KBI - Keneseth Beth Israel | 1 | $ | 2,670 | |
| Masonic Home of Virginia (MAHOVA) | 1 | $ | 459 | |
| MMW Camps | 1 | $ | 500 | |
| NCSY Summer | 2 | $ | 3,000 | |
| Neve Michael Children's Village | 1 | $ | 1,274 | |
| Or Ami - Congregation Or Ami | 1 | $ | 211 | |
| Or Atid - Congregation Or Atid (Richmond, VA) | 1 | $ | 211 | |
| RTA - Rudlin Torah Academy | 3 | $ | 4,895 | |
| Shineforth -Formerly UMFS | 1 | $ | 160 | |
| St. Joseph's Villa | 1 | $ | 913 | |
| St. Stephen's Episcopal Church | 1 | $ | 6,000 | |
| TBE - Temple Beth El | 2 | $ | 3,995 | |
| Temple Beth-El (Providence, RI) | 1 | $ | 1,910 | |
| TEMPLE SINAI (Newington, CT) | 1 | $ | 518 | |
| The Virginia Home | 1 | $ | 297 | |
| US Holocaust Memorial Museum | 1 | $ | 21 | |
| VCU Foundation | 1 | $ | 3,432 | |
| VCU Massey Comprehensive Cancer Center | 1 | $ | 333 | |
| VHM - Virginia Holocaust Museum | 2 | $ | 759 | |
| Virginia Home for Boys and Girls | 1 | $ | 75 | |
| Weinstein JCC | 4 | $ | 11,005 | |
| **Total Special Purpose Funds** | | **$** | **552,498** | |

**III. FIELD OF INTEREST FUNDS**

| | | | | |
|---|---|---|---|---|
| BBYO (Washington, DC) | 1 | $ | 1,000 | 2025 Rachel B. Banks Youth Fund |
| Friendship Circle of Virginia | 4 | $ | 3,978 | Joy Kramer Memorial Fund, Ernst & Anne Fischer Older Adult Fund, & Jill Peck Memorial Fund |
| GreenSpring Foundation | 1 | $ | 1,200 | Joy Kramer Memorial Fund |
| JCFR - Jewish Community Federation of Richmond | 1 | $ | 4,000 | 2025 Rachel B. Banks Youth Fund |
| JFS - Jewish Family Services | 2 | $ | 1,096 | Ernst & Anne Fischer Older Adult Fund & Sylvia & Max Plotkin Memorial Fund |
| RTA - Rudlin Torah Academy | 4 | $ | 3,600 | 2025 Rachel B. Banks Youth Fund, Henry S. and Karin Fine Legacy Fund, Jill Peck Memorial Fund, & Joy Kramer Memorial Fund |

| | CURRENT | | AMOUNT | |
|---|---|---|---|---|
| **FIELD OF INTEREST FUNDS Con't** | | | | |
| Weinstein JCC | 3 | $ | 12,141 | 2025 Rachel B. Banks Youth Fund, Henry S. and Karin Fine Legacy Fund, & Ernst & Anne Fischer Older Adult Fund |
| **Total Field of Interest Funds** | | **$** | **27,015** | |
| **IV. MANAGEMENT/INVESTEMENT AGENCY GRANTS** | | | | |
| **Total DAF Recommendations** | | **$** | **1,606,465** | |
| **Total Education Tax Credits** | | **$** | **408,304** | |
| **Total Special Purpose Funds** | | **$** | **552,498** | |
| **Total Field of Interest Funds** | | **$** | **27,015** | |
| **Total Life & Legacy Incentive Grants** | | **$** | **15,000** | CBA, COAmi, JFS, KBI, TBE, WJCC |
| **Total Management/Investment Agency Grants** | | **$** | **1,202,171** | |
| **Total 2026 RJF Grants (1/1 -3/17/26)** | | **$** | **3,811,453** | |
| Total checks: 377 | | | | |

# Schedule of Meetings 2026-27 (REV. 8/11/26)


Richmond Jewish Foundation

**5540 Falmouth Street, Suite 201**
**Richmond, VA 23230-1800**

**Phone: (804) 545-8656**

www.rjfoundation.org


## STAFF

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**Hirschler Seminar** – TBD

**Board of Directors**
5:30 PM

| | |
|---|---|
| August 20, 2026 | Thursday |
| November 12, 2026 | Thursday |
| February 11, 2027 | Thursday |
| May 20, 2027 | Thursday – 12:00 PM - Zoom |
| June 2, 2027 | Joint Annual Meeting, Time TBD |
| June 24, 2027 | Thursday – Annual Meeting/EOY Celebration |

**Executive Committee**
12 PM

| | |
|---|---|
| August 6, 2026 | Wednesday |
| November 3, 2026 | Tuesday |
| February 2, 2027 | Tuesday |
| May 4, 2027 | Tuesday |

**Grants Committee** – Zoom
12 PM

| | |
|---|---|
| September 17, 2026 (1:30 PM) | Tuesday |
| December 15, 2026 | Tuesday |
| March 25, 2027 | Tuesday |
| June 17, 2027 | Tuesday |

**Investment Committee**
11:45 AM

| | |
|---|---|
| July 16, 2026 | Thursday |
| October 15, 2026 | Thursday |
| January 14, 2027 | Thursday |
| April 15, 2027 | Thursday |

**Finance Committee**
12 PM

| | |
|---|---|
| July 28, 2026 | Tuesday |
| October 27, 2026 | Tuesday |
| January 26, 2027 | Tuesday |
| April 27, 2027 | Tuesday |

**Development Committee** - Zoom
12 PM

| | |
|---|---|
| July 7, 2026 | Tuesday |
| October 6, 2026 | Tuesday |
| January 6, 2027 | Wednesday |
| April 12, 2027 | Monday |
| June 22, 2027 | Tuesday |

## DEADLINES

**Genesis Incentive Fund Grants**
Begins May 1, 2026 – until $100K depleted

**Fall Grants**
September 4, 2026

**Saslaw Educ. Fund**
**Greenberg Fund**
**Karp/Sroka Fund**
March 6, 2027

**Banks Youth Fund**
June 1, 2027

**Summer Grants**
June 1, 2027

**Life & Legacy Events:**
November 15, 2026