



AUSTRALIAN Jewish Funders

Annual Report 2012-2013



AJF

Australian Jewish Funders

Contents

Mission Statement	Inside Cover
Letter to Members from the Chair	1-2
Executive Officer's Report	3
Activities 2012 - 2013	4-11
Members Meetings	4-9
2012 Annual Conference	10-11
Newsletter	12
Website	12
Governance	13
Sustaining Members	13
The Year Ahead	14
Financials	15-17
Contact Details	Back Cover

Mission Statement

The Australian Jewish Funders (AJF), dedicated to maintaining the continuity of Australian Jewry, is a forum for donor individuals, families, foundations and professionals to enhance the understanding and quality of philanthropy in the Australian Jewish community, Israel and the wider community.

Chairperson's Report



Debbie Dadon

As I sit here and put pen to paper to write this report on the significant and successful year that has been, I have cause to pause and reflect on the fact that, while the AJF has achieved so much, I am acutely aware that our work is very much a work in progress.

I am tremendously proud of the AJF's achievements to date yet I am conscious of the fact that reflecting on the past should always encompass a peek at the future, an element of looking ahead to the next milestones, to envisage what the AJF of the future should be like and to plan new ways in which the AJF can better serve its members and the community.

It is my very great pleasure to present to you the Annual Report for the Australian Jewish Funders for the year 2012 / 2013. Please enjoy this report as a summary of our activities and financial records.

Our focus over the past twelve months has been, and will continue to be, on collaboration, innovation and leadership. In addition to this we look to strengthening and deepening existing relationships and on building new relationships. The truly commendable growth in the AJF initiatives previously seeded and implemented have come as the result of the tireless dedication, commitment and leadership of our AJF team as it focuses on developing these initiatives and maintaining the momentum.

Our Australian Victorian Jewish community is diverse, outward-looking and generous. The contributions of the Jewish community to our intellectual and public life, to culture, to the professions and to business cannot be overstated and should never be taken for granted. However, it doesn't stop there. Personally, I remain in awe of the depth, diversity and breadth of young innovators and creative thinkers within our Jewish community and I am humbled by the opportunity we have to harness and invest in this resource, to back these young minds and to give them a voice through our initiatives. AJF Innovation, Next Generation Engagement, Moishe House and our partnership with Schusterman Foundation and the ROI Community are all examples of philanthropy investing in the power of human ingenuity. Amazing things are possible when we invest in people, including entire transformations. And that is, of course, our ultimate aim — to bring about transformations that create lasting change.

The primary focus of the AJF continues to be our members. We have connected with all our members on a regular basis in order to stay abreast of their needs and challenges. Throughout the year we hosted some interesting meetings for our members with both international and national speakers that we have strategically sourced in response to our members' needs and interests. The conversations that evolve at these meetings are so very rewarding and inspiring as we discuss, explore, learn and share.

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Chairperson's Report continued

In addition to our regular member meetings, we have hosted some tremendous gatherings and events providing further opportunity for discussion and collaboration in an intimate and focused environment.

Our 2012 Annual Conference was another great success and provided a wonderful opportunity to discuss and explore the topic, Next Generation Engagement - Jewish Life, Continuity and Innovation. It was a privilege to welcome Sandy Cardin, President of the Charles and Lynn Schusterman Philanthropic Network, as our keynote speaker and his message stimulated some robust and passionate discussion about modes of engagement that are relevant for the next generation.

In addition, I am once again delighted to report, with immense pride, that our membership continues to grow in both Melbourne and Sydney which is testament to the value of the services we provide.

The AJF is headed by a capable and committed team of leaders and I would like to thank them all. I am sure all our members appreciate the extraordinary amount of planning, liaising, coordinating and consulting that takes place in order for the AJF to maintain its momentum as an exciting and dynamic organisation. My sincere thanks and gratitude are extended to my fellow board members for their time, counsel, support and dedication over the past year. The expertise and commitment they collectively and individually bring to the AJF provides a fantastic resource.

I continue to be grateful for the tireless work of our Executive Officer, Tracie Olcha. Tracie is relentless in her focus and determination to ensure that, in an evolving philanthropic landscape, we continue to build our reputation and be an invaluable resource to our members on their personal philanthropic journey. The sincerity and sheer magnitude of Tracie's dedication and commitment is truly amazing.

In May we welcomed Natalie Rathner to the AJF team on a part time basis. Natalie has a strong commitment toward Jewish life and creating a vibrant and dynamic community. This, together with her organisational skills and understanding of the issues facing young Jewish adults, has made her an invaluable part of our AJF leadership team as we aim to provide different avenues of engagement for young Jews.

In addition, we have been so very fortunate to have the involvement and support of a great many remarkable people. The ongoing commitment and support of the AJF by our pro bono solicitors, Arnold Bloch Leibler and our pro bono auditors, GMK Partners Pty Ltd, is greatly appreciated. I would also like to thank SPR Australia and acknowledge their generous sponsorship which facilitated the development of a new interactive, informative and vibrant website that will be launched in the coming year.

Great and growing challenges face those of us engaged in the philanthropic community and the next few years offer the prospect of even greater change. As we embrace the growing number of initiatives under the AJF umbrella and confront the shifting needs of the community, it is imperative that we continue to evolve and be receptive to and responsiveness to our members needs.

I feel a sense of exhilaration for the powerful journey ahead and I look forward to sharing with you all the next twelve months.



Debbie Dadon
Chair

Executive Officer's Report

At the Australian Jewish Funders we believe that the future of effective philanthropy involves three key attributes; strategic collaborations, innovative approaches, as well as strong and courageous leadership.

In the past 12 months the AJF held some very successful member meetings, providing inspiring and thought provoking speakers and offering insight, knowledge and methods to question our philanthropic strategies.

A major focus of the last year has been collaboration. We have learnt that there are many issues facing our community both local and global that are just too large and complex for any one funder to tackle on their own. With a shared vision for addressing a common need and a commitment to combining respective, experience, expertise, resources and connections, we increase the chances of success.

As our membership continues to grow we are building a strong network that allows for larger foundations to leverage their size and smaller families and foundations to connect for greater impact. From sharing information at a member meeting or at our annual conference, to co-ordinated grant making targeted at a specific project, as a network we have the potential and capacity to create long lasting and systemic change.

One of our most successful achievements has been the establishment of AJF Innovation, a platform that will facilitate a collection of initiatives relating to Jewish next generation engagement and other areas of interest to support the Australian Jewish community.

As funders, we can show great leadership by supporting innovation, especially within our Jewish community. If our grant making encourages existing organisations, upcoming young leaders and social activists to take strategic and calculated risks, and we give them the scope to innovate and explore opportunities outside current programs and activities, we may well find new and different ways of doing things.

At the AJF we aspire to encourage and support families with the challenges they face with inter generational giving. We want to be bold and take risks, ultimately challenging the way we fund to maximise impact.

In the coming year, we look forward to arranging personal meetings with all our members to find out how the AJF can better support you and your giving. We would like to learn more about your areas of funding interest, the impact you are hoping to achieve and your thoughts around collaboration and matching grants.

The community is in a time of need where it is imperative that people step up as innovative leaders of change. We at the AJF, are striving to be part of the leadership movement, re-vitalising our community. I would like to thank Debbie Dadon, Chair of the AJF and all the Directors for their leadership, foresight and constant support. It is an absolute privilege to work with such an incredible team. Together we aim to grow and strengthen our network and provide a myriad of community building opportunities for a dynamic and vibrant Australian Jewish community. I would like to take this opportunity to welcome Natalie Rathner to the AJF team. Natalie has been with us for only a short time and has already been such incredible support, thank you Nat. I would also like to thank Arechea Hounsell, from the Besen Family Foundation for her continued assistance with all matters AJF.

We all need to be courageous, generous, creative and patient. Together, collaboratively, we can enrich our Jewish community, ensure our Jewish future and deepen our connection with Israel.



Tracie Olcha,
Executive Officer

Activities 2012 - 2013

Member Meetings



26 July, 2012 Healing the World One Step at a Time

Hosts: Spotlight Foundation

Location: Melbourne

Guest Speaker: Dr Sam Prince

Dr. Sam Prince, entrepreneur, aid worker and medical doctor is completely dedicated to voluntary work, creating social change and entrepreneurship. His latest project, as a passionate health professional dedicated to social work, is his not-for-profit organisation "One Disease At a Time", which has a simple but groundbreaking vision to systematically target and eliminate one disease at a time.

The first goal of this project is to eliminate Scabies from Australia, beginning with Arnhem Land in the Northern Territory. The complexity and sensitivity of this initiative has the potential to transform lives among the least healthy Australians. This philanthropic effort depends heavily on his drive and his dollars, and working collaboratively with government, private philanthropy and corporate sponsorship. His story was truly inspirational and his achievements quite remarkable. Dr Prince's quote by Goethe sums up his philosophy; "whatever you can do or dream you can do, begin it. Boldness has genius, power and magic."

26th August 2012 AJF & ROI Australian Gathering

Hosts: Danny Almagor and Berry Liberman

Location: Melbourne

The AJF, together with the ROI Community, held a very successful gathering for 50 young social entrepreneurs, community leaders and engaged Jews from Melbourne and Sydney, between the ages of 20 and 40. The gathering explored existing and potential pathways of Jewish life and social activism in Australia. It was a very empowering day that seeded many connections and project ideas. Four of these project ideas were successful in receiving start-up grants, to make their Big Ideas into a reality. The following is a description of the four programs, two of which are well along the path of finalising the details, and two of which have already been launched.

The Eden Project is the first Australian Jewish innovation hub for emerging entrepreneurs, social innovators and change-makers. It aims to inspire, engage and develop a new generation of Jewish leaders who can address challenges facing the Jewish community through social entrepreneurship and innovation.

The Isaiah Fellowship is being launched under the umbrella of Jewish Aid Australia. It is a year long fellowship which aims, through education and training, to provide a platform for nurturing a new generation of effective Australian Jewish leaders in the social justice and social innovation spheres.

Project Deborah is the first initiative in our community that aims to provide capacity building skills to Jewish women. At the heart of the project is the dream of developing a large network of young and professional Jewish women.

Let My People Know is an online Jewish community hub for young Melbourne Jews to connect and find out the scoop on what's happening in Melbourne, both within and beyond the community.



Activities 2012 - 2013

Member Meetings *continued*

29 August 2012
AJF & JCA Dinner
Powering a Global Jewish Future

Hosts: Bruce and Barbara Solomon
Location: Sydney

Guest Speaker:
Sandy Cardin,
President of the Charles and Lynn
Schusterman Philanthropic Network

Drawing upon more than 20 years of professional experience in the nonprofit sector, Sandy is a frequent presenter and panelist in global forums on topics related to catalytic grantmaking, innovative program-building, Jewish identity, young adult engagement, Israel and more. In both Melbourne and Sydney, Sandy spoke to guests about the shift in the philanthropic world, from individual donors to the emerging global network of philanthropic initiatives, a shift that was catalysed by the Schusterman family. Sandy's expertise in funding projects that have a significant influence on the future of the global Jewish community was evident as he presented his notes on how to continue moving forward as Jewish funders.



Undeniably, Sandy has an extremely strategic approach to philanthropy which can have a massive impact. This became evident through his story of how nearly 25 years ago, Sandy overcame the issue of not reaching and connecting different hubs of Jewish life around the world. By starting up a network agenda to help connect these communities, Sandy shared how the increasing Global World renders a need to proliferate new tools and technologies that make it easier to connect with people. Sandy expressed to guests how “the definition of community is changing from just physical, to also include virtual attributes”, and in order to secure a vibrant future for the Jewish people, we must strategise; work with partner organisation, empower young leaders and animate networks in the community.



8th November 2012
AJF Annual General Meeting

Hosts: Werdiger Family

Guest Speaker: **Dr Carol Adelman**

The AGM is always a wonderful opportunity for members of the AJF to learn and share experiences from the past year, and dreams for the future. The AGM for 2011 - 2012 welcomed Dr Carol Adelman, Senior Fellow and Director of the Centre for Global Prosperity, USA. Dr Adelman's talk focused on 'Global Philanthropy and Beyond' - how the new global financial world is reshaping the way in which philanthropists engage in funding. Dr Adelman discussed how new financial mechanisms, such as social stock exchanges, remittances, impact investing and social entrepreneurship are transforming traditional ways of giving.



10 December 2012
Building a Community
of Social Entrepreneurs

Hosts: Danny Almagor and Berry Liberman

Guest Speaker: **Dr Nir Tsuk**

After serving as a Director of Askoka's Global Fellowship program, connecting more than 2000 social entrepreneurs in 72 countries, Nir is now launching Ashoka in Israel, his homeland. Nir holds a PhD from Cambridge University in social and political sciences – where he wrote his dissertation on social networks, social capital and intentional communities (such as the Israeli Kibbutz and the English Garden City). He continues to explore those areas as he builds Ashoka's global community today. Nir shared his expertise with AJF members about how to build a community of social entrepreneurs through scouting, networking and connecting. Nir's message focused on the amazing impact and potential that arises from forming a community of social change-makers.

Activities 2012 - 2013

Member Meetings *continued*

7th March 2013

Dragon's Den

Hosts: Jennifer & Tony Smorgon

Guest Speaker: **Dr Aron Ping D'Souza**

The AJF Dragon's Den style evening provided a unique forum for members to collaborate, discuss and actively support projects aiming to counteract issues facing the community. The inspirational event welcomed some of the brightest and best young members of our community, to present their innovative program ideas that were seeded at the 2012 AJF & ROI Australian Gathering.

We were also fortunate enough to hear from Dr Aron Ping D'Souza, a young Australian funder and next generation innovator. Dr Ping D'Souza spoke about the Nexus Global Youth Summit, and other thoughts and experiences he has relating to next generation encouragement.



The evening was a perfect example of how Next Generation Engagement has been at the forefront of our efforts over the past year, and how by offering our expertise, feedback and support, we are helping to empower the next Jewish community leaders as they move forward.



26th June 2013

Moishe House Melbourne Funders Evening

Hosts: Moishe House Melbourne

The residents of Moishe House Melbourne opened their doors to members of the AJF and the board of Jewish Care to thank funders and supporters for making Moishe House Melbourne possible. The evening was incredibly encouraging for members to see the creatively Jewish space that the AJF has helped to create. The evening included activities organised by the housemates: Yosl, one of the three residents sat around some couches with a variety of cards triggering discussion around issues facing the community. He started with two guests and after 30 minutes had at least 15 people enthralled in conversation and debate. Meanwhile Brett, another resident, had a room full of budding artists creating 3D figures expressing Jewish identity.

Following the activities each of the residents spoke briefly about their desires and hopes for Moishe House and also shared personal accounts summarising how the experience has impacted their life and the lives of so many program attendees. As spoken by housemate Galit Klas at the event: "It's a privilege to be living in Moishe House Melbourne... The response to our programs has been overwhelming. I've seen the effect Moishe House is having on people; new friendships formed, leaders coming forward and young people feeling free to express their Judaism in an open space".



2012 Annual Conference

27th August 2012 Pre Conference Cocktails

Hosts: Jennifer and Tony Smorgon

28th August 2012 2012 Annual Conference

Hosts: Harry New and Hall & Wilcox

The AJF is committed through AJF Innovation to be at the forefront of philanthropic innovation providing young Jewish adults with the resources and opportunities necessary to become leaders and change makers within our community.

The 2012 Annual Conference explored how young Jewish adults can have meaningful connections to Jewish life and actively engage with their peers and the broader community. The theme of the day, **Next Generation Engagement - Jewish Life, Continuity and Innovation** was a great success and sparked interesting discussions amongst attendees.

Danny Almagor, our MC for the day, driven by his passion to have a positive impact on the world and create social change, motivated and inspired guests. He shared relevant and pertinent connections throughout the proceedings, reflecting on his experiences and personal values about creating a strong and vibrant community going forward. We thank him for his time, efforts and contribution.

It was a privilege to welcome **Sandy Cardin**, President of the Charles and Lynn Schusterman Philanthropic Network, as keynote speaker. Sandy's message to the group was strong; urging us to establish new modes of engagement that are relevant for the next generation, giving them what they need in order to create a meaningful Jewish life that resonates with them. This means transient, networking-focused, experiential and innovation programs. Sandy encouraged the group to practice mindfulness with our giving so that we provide the next generation with the best tools, technology and opportunities as we would in business, and encourages success. Sandy's take home message is that we need to collaborate, communicate and co-operate to stimulate increased giving from the wider-community and to monitor, analyse and evaluate our effectiveness.



Three very interesting and quite different panelists shared their ideas and experiences with the group around the topic **Gen X and Why?**; **Jared Alford**, Director of Student Development, Leadership and Student Personal Development at Mount Scopus Memorial College, **Amanda Goodman**, Head of Strategic Planning at Jewish Communal Appeal, Sydney and **Stefan Oberman**, Community Activist and former lay-leader of AUJS.

Their personal stories and anecdotes around how to engage the next generation in Jewish community life were truly fascinating, and it was incredibly interesting to hear first hand how all three individuals are tackling the issue, and working to create passionate and inspired young, Jewish individuals. Following on from the panel, members and guests broke off into groups to further explore the topic of next generation engagement through the "Innovation Cafes".



The day concluded with an address from **Elissa Krycer**, ROI Community Manager, who informed guests about the purpose and work of the ROI Community. Elissa shared how by bringing together and creating networking opportunities, young and innovative Jews around the world can organically generate sparks and interest between themselves, and take an active role in shaping the Jewish future.

We thank **Harry New** and **Hall & Wilcox** for hosting us, their support is greatly appreciated, and **Sandy Cardin** and **the Schusterman Philanthropic Network** for their continued partnership.



Newsletters

The monthly eNewsletter continues to be a valuable communication tool, not only to inform about upcoming AJF activities but also to share interesting articles and events from both here in Australia and around the global philanthropic world. All past eNewsletters will be available exclusively to members in the Member Dashboard section of the AJF website.

Website

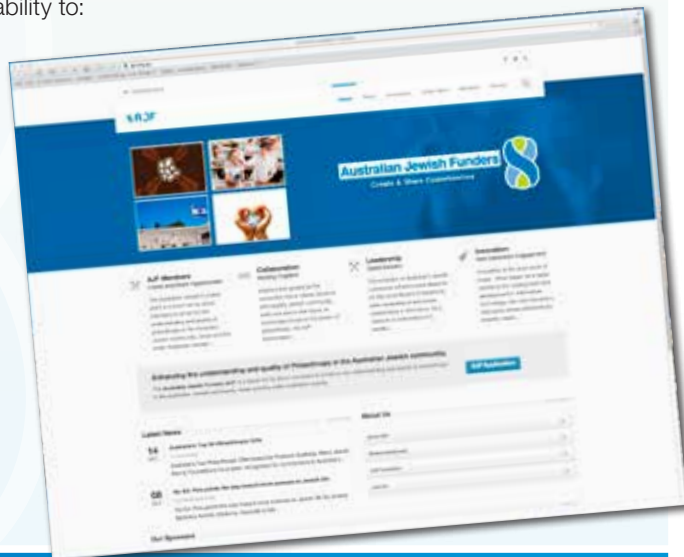
Thanks to the generous sponsorship of SPR Australia, an interactive, informative and vibrant website was under development throughout 2012- 2013.

The new website includes easy navigation and a variety of features in the private, members only section, in order for members to take advantage of the new opportunities for learning and collaboration to enhance members philanthropic journey. Some new features include the ability to:

- Connect with fellow members through instant messaging
- Share information about projects and organisations you support
- Search for like-minded members around specific areas of interest

- Search for resources using key words
- Easily navigate the site using the floating member menu bar

By bringing our network online, we hope to facilitate greater member-to-member connections and be more accessible to our membership base, all in the effort to support member giving.



Governance

AJF Board

The AJF Board of Directors consist of:

Debbie Dadon,
Chair (April 2007)

Ian Allen
(as an alternate to Sam Lipski)
(October 2009)

Andrew Blode
(April 2007)

Jeremy Dunkel
(March 2011)

Laurence Joseph
(October 2009)

Sam Lipski
(April 2007)

David Werdiger,
Secretary, Public Officer (April 2007)

Sustaining Members

Sustaining members continue to provide \$4000 or more annually to support the ongoing work of the Australian Jewish Funders. These members demonstrate their commitment to the work of the AJF and show leadership and vision for the future. We sincerely thank our sustaining members for their ongoing support.

Besen Family Foundation

Jeremy & Roxanne Dunkel

Gandel Philanthropy

Danny Almagor & Berry Liberman Family

Jack & Robert Smorgon Families Foundation

The Pratt Foundation

Werdiger Family

AJF Staff

Tracie Olcha
Executive Officer

Natalie Rathner
Administration Assistant

The Year Ahead

- Continue to search for and implement interesting and challenging services and activities that support members with their giving and that will provide added value to their membership.
- Create opportunities for smaller group meetings around specific areas of interests, meeting individual needs of members.
- Grow membership in both Melbourne and Sydney with the support of existing members.
- Continue to meet with individual members and stay abreast with their needs and desires on how the AJF can best support their giving.
- Further develop relationships with other peak philanthropic bodies; Philanthropy Australia, Australian Environmental Grantmakers Network (AEGN) and Women's Donor Network to name a few.
- Continue to expand and initiate relationships with philanthropic networks around the world like the Jewish Funders Network in the United States, Council on Foundations and the growing number of Jewish and wider community blogs.
- Develop partnerships with local and international foundations that provides opportunities to grow the organisation and its activities.
- Organise a group of members to attend JFN's Annual Conference in Miami, March 9-11, 2014, with a pre conference event to visit Jewish Havana, Cuba, March 6-9, 2014.
- Continue to send out interesting and relevant monthly eNewsletters.
- Hold thought provoking member meetings in Melbourne and Sydney.
- Continue to look for best practise and successful programs to bring to Australia under the banner of AJF Innovation, including new initiatives 36 Under 36, Jewish Teen Philanthropy and PJ Library.
- To bring world-renowned keynote speakers to Australia to share expertise and best practice in the philanthropic sector. Planned speakers include **Andres Spokoiny**, President and CEO of the Jewish Funders Network, USA (24th-30th October 2013) and **David Cygielman**, CEO and Founder of Moishe House (4th-12th December 2013).
- To hold another incredibly successful AJF & ROI Australian Gathering for 20 - 40 year olds, providing support and guidance development and implementing innovative and transformative Jewish programming for their peers.



Financials

The amounts disclosed in this financial information are for the period of 1 July 2012 to 30 June 2013. Full financial statements will be available for members to download within the member dashboard section of the AJF website ajf.org.au in the coming weeks.

The accounting policies used in the preparation of the financial statements are in the opinion of the Directors, appropriate to the need of the members and are in accordance with the Corporations Act 2001, including:

- Giving a true and fair view of the financial position of the Australian Jewish Funders as at June 30 2013
- That there are reasonable grounds to believe that the Australian Jewish funders will be able to pay debts as and when they become due and payable.



Financials continued...

Summary of Financials

INCOME STATEMENT

	2013	
	\$	
Revenue	114,552	
Other income	15,000	
Administration expenses	58,850	
Website development expenses	1,957	
Conference expenses (including ROI gathering)	35,400	Note 1
Professional development expenses	10,394	
Other expenses	8,617	
Profit (Loss) for the year	14,334	
Other comprehensive income		
Items that will not be classified subsequently to profit or loss	-	
Items that will be reclassified to profit or loss when specific conditions are met	-	
Other comprehensive income for the year, not tax	-	
Total comprehensive (loss)/income for the year	14,334	
CURRENT ASSETS		
Cash and cash equivalents	10,737	
Trade and other receivables	1,000	
Other assets	4	
TOTAL CURRENT ASSETS	11,741	
TOTAL ASSETS	11,741	
LIABILITIES		
CURRENT LIABILITIES		
Trade and other payables	2,905	
TOTAL CURRENT LIABILITIES	2,905	
NON-CURRENT LIABILITIES		
Trade and other payables	-	
TOTAL NON-CURRENT LIABILITIES	-	
TOTAL LIABILITIES	2,905	
NET ASSETS / (LIABILITIES)	8,836	
EQUITY		
Retained earnings / (Accumulated losses)	8,836	
TOTAL EQUITY	8,836	

Note 1 - 2012 Annual Conference Income Statement

	\$
INCOME	
Members	5,600
Non Members	2,800
Sponsorship	4,145
TOTAL INCOME	12,545
EXPENSES	
Jewish News Adverts	1,705
Jewish News Set Up Costs	100
Artwork - flyer, form and logo	528
Printing programs and artwork	443
Officeworks Printing	54
JCA Dinner	2,908
Pre Conference Catering	3,820
Pre Conference Hire	325
Administration Support	200
TOTAL EXPENSES	10,083
NET PROFIT	2,461

For more information or enquiries contact:

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