



JHSD
JEWISH HISTORICAL
SOCIETY OF DELAWARE

515 North Market Street
Wilmington, Delaware 19801
302.655.6232
jhsdelaware.org

FOUNDED 1974
INCORPORATED 1975

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*OF BLESSED MEMORY

Treasurer's Report: April 3, 2022



Paula Gordon, Treasurer

treasurer@jhsdelaware.org

2021 Operating Revenue
2021 Operating Expenses
Coxe House Renovation Fund: Revenue and Expenses
JHSD Endowment Fund: Progress!
2022 Operating Revenue and Expenses: 1st Quarter
Program Partners
Granting Organizations
Thank you!

2022-04-03 JHSD

Hello everyone,

I'm pleased to present a brief report about how we did financially in 2021 and our financial plans for 2022.

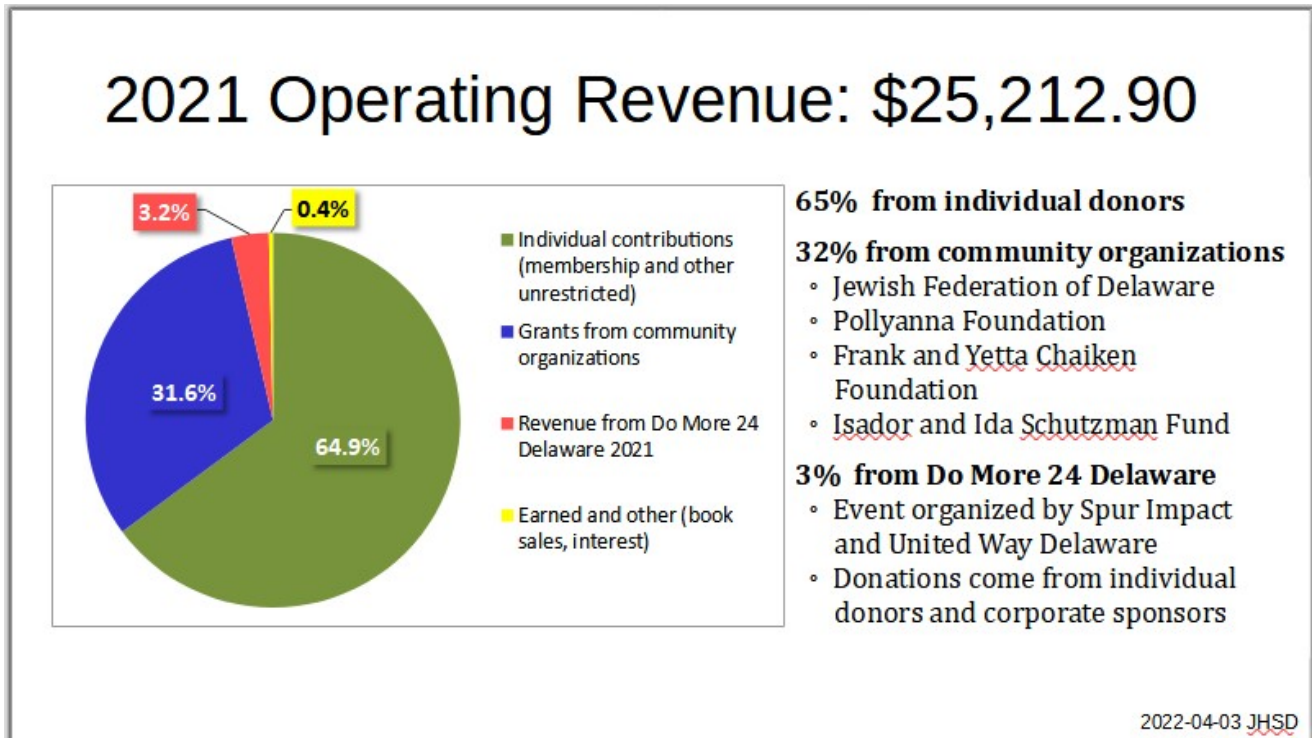
The bottom line is that we are doing well financially, thanks to our generous individual donors, community organizations, and an important grant from Delaware Humanities and the National Endowment for the Humanities.

Following is a somewhat expanded version of the presentation given at our annual meeting on April 3, 2021. I have added more details and some links.

Thank you for your interest and feel free to get in touch!

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Instagram: <https://www.instagram.com/jhsdel/>



Our fiscal year is the calendar year, January through December. Please note that these first two slides cover operating revenue and expenses only; Coxe House-specific donations and expenses are reported separately.

2021 Operating Revenue (not endowment or Coxe House restricted)	
Individual contributions (membership and other), unrestricted	\$16,350.68
Unsolicited grants from community and family foundations	\$2,959.00 <i>unrestricted</i>
Jewish Federation of Delaware allocation for 2021	\$5,000.00 <i>website redesign</i>
Revenue from Do More 24 Delaware 2021	\$814.75
Earned and other (book sales, interest)	\$88.47
Total operating revenue received in 2021	\$25,212.90

Our operating revenue in 2021 was \$25,212.90. Almost two-thirds of this came from you, our generous donors.

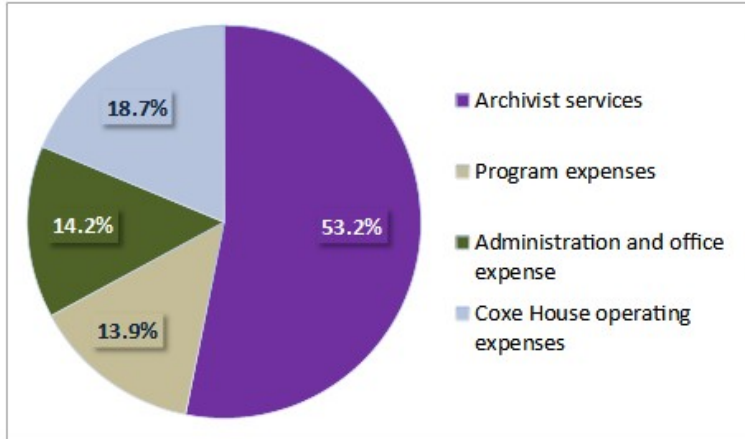
We also received an allocation from the Jewish Federation of Delaware and grants from The Pollyanna Foundation, the Frank and Yetta Chaiken Foundation, and the Isador and Ida Schutzman Fund. Combined, these grants made up almost one-third of our operating revenue for the year.

We participated in Do More 24 Delaware for the first time last year and were amazed at the response. Without much advance notice, we generated more than \$800 in those 24 hours.

Less than 1% of revenue came from other sources, including checking and savings account interest and purchases of JHSD publications, like *Justice, Justice Shalt Thou Pursue* about Delaware’s Jewish Judges, by Richard D. Levin, and *A Tribute to my Teacher Rabbi Simon Krinsky*, a book of early 20th Century poetry translated from the Yiddish by Rabbi Edward Zerlin.

Link: <https://jhsdelaware.org/publications/>

2021 Operating Expense: \$21,120.95



Operations and programs: \$17,164.42

- Archivist services
- Program expenses (e.g., digital collections)
- Administration and office expense (phone, D&O insurance, newsletter, advertising, mailings, office supplies, etc.)

Coxe House operating expense: \$3,956.53

- Rent, electricity, internet
- Commercial liability insurance
- Security system monitoring
- Property maintenance and repair

2022-04-03 JHSD

We spent \$21,120.95 last year, less than we earned, and this includes the brand-new costs of occupying the Coxe House, which began in April 2021.

2021 Expenses – operating, administration, programs

Operations and Programs, not Coxe House	\$17,164.42
Archivist services	\$11,227.20
Program expenses (digital collections)	\$2,941.00
Administration and office expense, includes telephone, ads	\$2,996.22 also includes newsletter
Ongoing attributable to physical location, April – Dec 2021	\$3,956.53
Commercial liability insurance, small plumbing repair;	
prorated rent, security monitoring, electricity, internet connectivity.	
No janitorial or maintenance expenses were incurred in 2021.	
Total operating expenses 2021	\$21,120.95
Over (under)	\$4,091.95

All told, total expenditures in 2021 were similar to 2020. The added costs of the Coxe House were balanced out by a reduction in the number of hours billed by Gail Pietrzyk, our archivist, for day-to-day operations and programs. She spent a lot of time planning and preparing our collections for the move, and these hours were entered as one-time Coxe House expenses as opposed to operating expenses.

Program expenses were mainly digitizing oral history tapes to preserve them and allow us to share them with the community, as you will hear about in today’s presentation.

Although direct program expenses are a small(ish) slice of the pie, most of Gail’s time is actually spent on activities and programs that fulfill the mission of the organization, as you can see on the next slide:



Archivist Services

- Assists community members in identifying and preserving archives
- Inventories and processes accessioned archival material
- Assists researchers and answers queries by phone, email and on site
- Curates the "Throwback Delaware" feature for *Delaware Jewish Living*
- Provides expert advice to the JHSD Board
- Manages JHSD programs and projects
- Trains and supervises our interns
- Edits our newsletter
- Maintains our website
- *And so much more!*

2022-04-03 JHSD

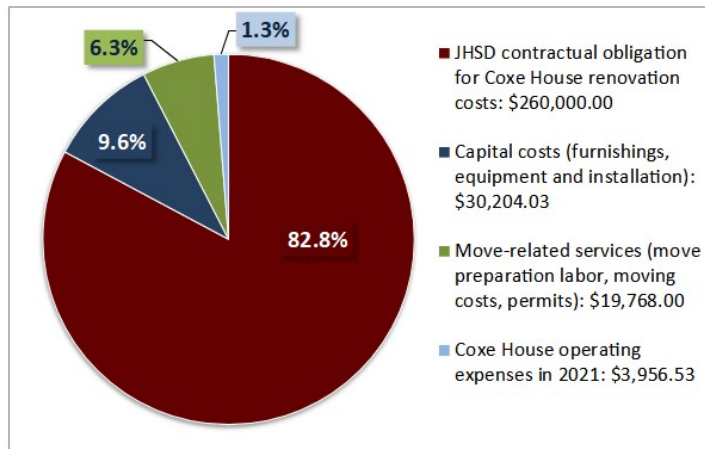
In other words: Her time is spent on just about everything having to do with our collections, programs, and public outreach.



I took this photo of Gail chatting with Lou Brown, of blessed memory, in January 2019, when Gail was helping volunteers pack up the archives of Adas Kodesch Shel Emeth synagogue.

Photo credit: Paula Gordon.

Coxe House Renovation Fund



\$307,739.20 raised from October 2019 through July 2021

We are grateful to the Milton and Hattie Kutz Foundation for capital grants in 2020 and 2021, which are included in this total.

\$313,928.50 spent to date

Our share of renovations, furnishing and equipping the Coxe House, the move, and our first year of operating expenses (April–December 2021).

We covered the balance from operating revenue and cash reserves.

Additional expenses of approximately \$13,000 are expected in 2022 and 2023.
Of these, \$5,000 will be covered by a third grant from the Milton and Hattie Kutz Foundation.
We are submitting grant requests for the remainder.

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In late 2019, the Jewish Historical Society of Delaware began a campaign to fund our move from our space in the basement of the research library of the Delaware Historical Society to what has become the first building in Delaware dedicated to the study of Jewish History, The Delaware Center for Jewish History at the Coxe House.

Our original goal was \$360,000 -- \$260,000 for our share of the renovation of the building and an additional \$100,000 to start an endowment.

We are proud that despite the disruptions caused by COVID-19, we were able to raise almost \$308,000.

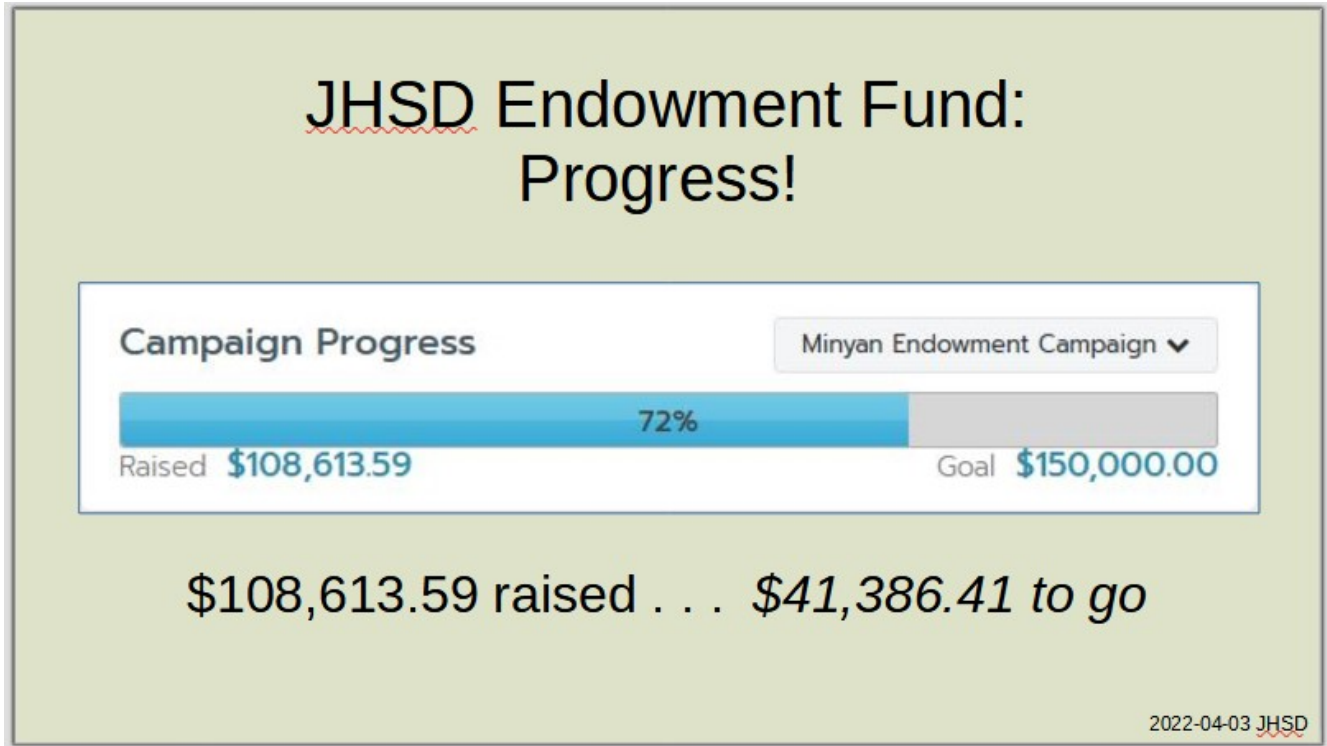
Thanks, once again, to the generosity of the community, we raised enough money not only to satisfy our contractual obligations for the renovation of the Coxe House but also almost exactly enough to furnish and equip the building and move in.

Included in this total is \$10,000 from The Milton and Hattie Kutz Foundation. The foundation has committed another \$5,000 in 2022-23, for a total of \$15,000 granted.

Aside from the renovation costs, our one-time expenses relating to the move fall into two main categories:

- Purchase and installation of furnishings, equipment and signage, for \$30,204.03; and
- Move-related services, such as space planning, preparing for the move, and moving costs, at \$19,768.00.

Note that the first year of Coxe House operating expenses appears as part of this pie chart. This is to give a full picture of the project to date. These expenses fall into the approximately \$6,200 spent on this project that we covered from our operating budget and cash reserves.



And, speaking of Coxe House-related operating expenses, as some of you already know, we have resumed fundraising for an endowment.

From the beginning of the project, the Jewish Historical Society of Delaware’s Board recognized that we would need an endowment to help us cover future occupancy costs and to foster the transformation of the society into a more vibrant organization with greater capabilities.

Last summer, even before we moved in, the Board began planning a new round of fundraising to create our endowment. We established a separate fund with the Jewish Fund for the Future at the Jewish Federation of Delaware, where contributions are prudently invested and managed.

Our current goal is at least \$150,000 to generate sufficient monies to fund an annual draw to-help cover our new occupancy expenses:

These include rent, electricity and internet, security monitoring, commercial liability insurance, sign permit fees, janitorial and planned maintenance, and a contingency for unexpected maintenance and repair.

We will continue to grow the endowment in the future to cover additional needs that may arise as we expand our capabilities.

This has been a targeted fundraising campaign so far, but more information about it will be shared in the coming months. Please inquire by email or phone if you would like to be contacted before then. (See final slide for information on how to donate.)



No discussion of the Coxe House is complete without mentioning our long-term partners, who encouraged us and provided support at every turn: The Delaware Historical Society and the Jewish Federation of Delaware.

We especially thank Delaware Historical Society Executive Director David Young; Chief Curator Leigh Rifenburg; former Director of Buildings and Grounds Martha Moffat; and Facilities Manager Thomas Jones.

At the Federation, thanks go to President and Chief Executive Officer Seth Katzen; Associate Director of the Jewish Fund for the Future Gina Kozicki; and Controller Terri Kuzo.

Other program partners include The University of Delaware Department of History and the UD Jewish Studies Program. Our student interns come to us through these programs and work on special projects under the guidance of professors in these departments, including professor of history Roger Horowitz, who will be presenting shortly.

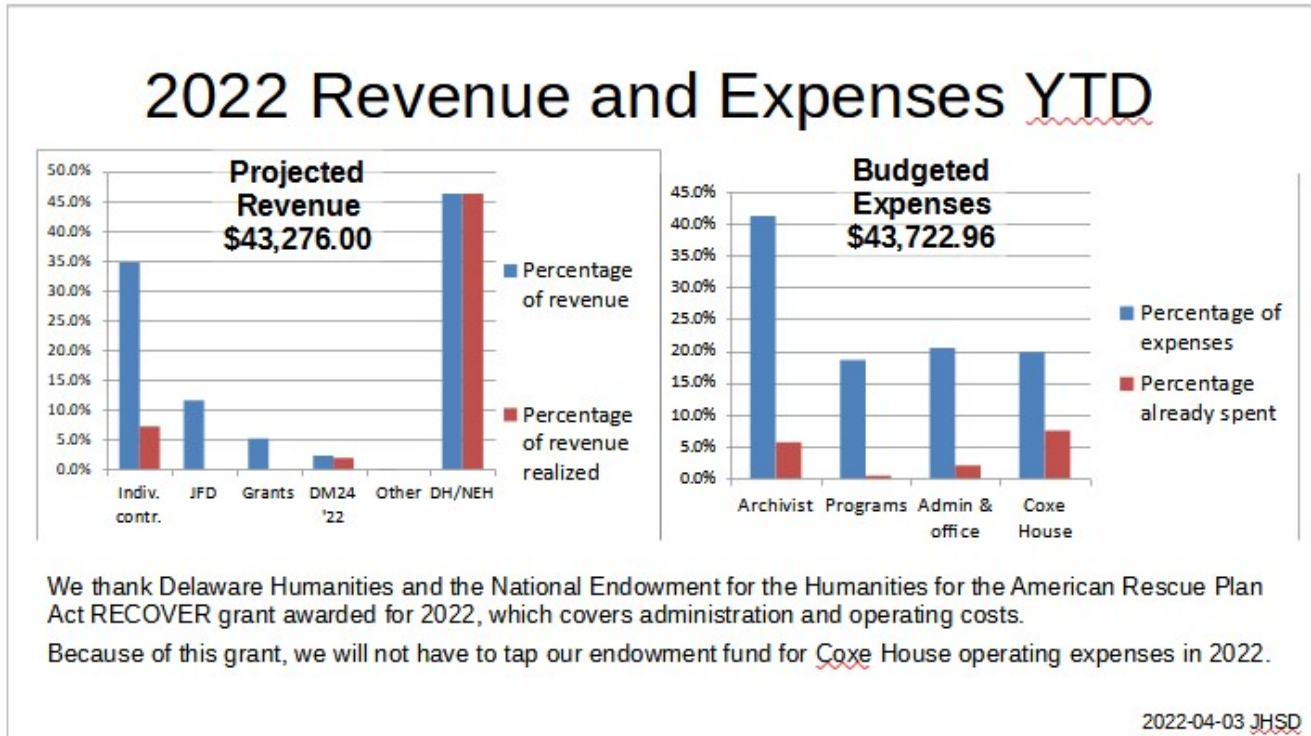
We also partner with Jewish War Veterans of Delaware to maintain the Jewish Veterans Memorial at the Siegel JCC, and we work with Jewish community organizations and synagogues in preserving their archival material.

And of course, we consider all of you our partners in telling the stories and preserving the history of Jews and Jewish life in Delaware.

Links:

Delaware Historical Society: <http://www.dehistory.org/>

Jewish Federation of Delaware: <https://www.shalomdelaware.org/>



Finally, here is a snapshot of 2022 to date. The blue bars represent the percentage of total revenue or expenses and the red bars show how far along we are in meeting these projections.

As you can see, our operating budget for 2022 is about double our budget in 2021. The increase is due to a few factors:

First, Now that our move is complete, Gail can devote the full complement of hours to archivist activities: fielding inquiries, programming, research, and processing new accessions, such as materials from Adas Kodesch Shel Emeth, the Halina Wind Preston Holocaust Education Committee, and the Siegel JCC.

Second, We are increasing outreach within Delaware and beyond, which means more money spent on advertising as well as memberships in professional associations for archivists and historians and those dealing with documenting the Jewish experience in the United States.

Third, With an increased presence comes greater responsibility and accountability, and we are investing in commercial software and professional services for bookkeeping, donor tracking and similar internal functions.

And finally, this year, while we are still funding our endowment, we will pay all Coxe House-related expenses from our general operating budget.

JHSD ANNOUNCES DELAWARE HUMANITIES AMERICAN RESCUE PLAN RECOVER GRANT

The Jewish Historical Society of Delaware (JHSD) is pleased to announce that they have been selected by the Delaware Humanities to receive a National Endowment for the Humanities American Rescue Plan (ARP) grant. These funds have been made available through the ARP Act and the National Endowment for the Humanities (NEH) for redistribution by Delaware Humanities to organizations committed to the humanities that have faced financial hardship due to the coronavirus.



Jewish Historical Society of Delaware:
Founded in 1974, the Jewish Historical Society of Delaware acquires, preserves, and publishes materials pertaining to the history of Jewish settlement and life in Delaware. To learn about becoming a member, visit <https://jhsdelaware.org/join>

National Endowment for the Humanities: Additional information about the National Endowment for the Humanities and its grant programs is available at <https://neh.gov>.



**NATIONAL
ENDOWMENT
FOR THE
HUMANITIES**

**deLaWare
HumanITIES**

Delaware Humanities: Delaware's independent, non-profit affiliate of the National Endowment for the Humanities, Founded in 1973. Delaware Humanities strengthens our communities by encouraging all Delawareans to be inspired, informed, and engaged through exploring the diversity of the human experience. Visit <https://dehumanities.org>.

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All this is possible because of an American Rescue Plan Act RECOVER grant, which we applied for and received from Delaware Humanities, a statewide agency distributing funds made available by the National Endowment for the Humanities.

Grants awarded by this program are intended to strengthen humanities nonprofits as they emerge from the COVID-19 pandemic.

The goal is to create more resilient organizations, and for us that means strengthening our internal capacity and increasing our donor base and other sources of revenue through more outreach and community engagement.

Links:

Delaware Humanities: <https://dehumanities.org>

National Endowment for the Humanities: <https://neh.gov>

Community granting organizations



Jewish Federation
OF DELAWARE

The Milton & Hattie Kutz
Foundation

The Pollyanna Foundation

The Frank and Yetta Chaiken Foundation

The Isador and Ida Schutzman Fund

2022-04-03 JHSD

I'd like to take one more opportunity to thank these community organizations for their support in the form of grants and allocations:

The Jewish Federation of Delaware (<https://www.shalomdelaware.org>);

The Milton and Hattie Kutz Foundation (<https://www.shalomdelaware.org/what-we-do/scholarships-grants.html>);

The Pollyanna Foundation;

The Frank and Yetta Chaiken Foundation;

The Isador and Ida Schutzman Fund.

Phyllis and Buddy Aerenson, Dr. Harriet Ainbinder, Rachel Allen, Chris and Regina Alonzo, Hon. Bernard Balick, Jayne Balick, Ruth S. Balick, Sidney Balick, Laura and Steve Balick, Philip and Diane Berger, Hugh Bleemer, Alan Bleier, Jack and Karen Jacobs Blumenfeld, Marsha and Dr. Howard Borin, Gene Castellano, Edna Chaikin, Ronald Cohen, Eileen T. Conner, Hon. Robert B. and Sally Coonin, Herbert Cooper, Jay and Georgia Cooperson, Lisa Dadone-Weiner, Allison Davis, John Day, Steven and Rhoda Dombchik, Eric M. Doroshov and Aida Waserstein, David and Judie Drexler, Lanny and Micki Edelsohn, Lynne P. Elick, John A. and Lena Jacobs Elzufon, Robin Karol-Eng and Jerald Eng, Alan and Peggy Lubin Evantash, Rebecca Fay, Paul and Gloria Fine, Shirley Fisch, Arnold Freedman, Ph.D., Arlene Friedman, Cedric Fuchs and Family, Rabbi David Geffen, Barry Schlecker and Ginger Weiss, Charlotte C. Gluckman, Joseph G. Goldberg, George Golden, Sheila and Perry Goldlust, Barbara Golin, Maura Golin, Steve Gonzer, Helen Gordon, Paula Gordon, Zelda L. Gordon, Suzy and Rabbi Peter Grumbacher, Jill S. and James R. Hammerschmidt, Ivy Harlev, Tina and Henry Heiman, Susan and Stephen Herrmann, Joyce Herron, Naomi Herzkowitz, Mrs. Beatrice Hirshout, Roger Horowitz, Diane Isaacs, Lawrence H. and Susan Tigani Isaacs, Francia Isakoff, Jack and Marina Jacobs, Jonathan Jaffe, Ruth Tomases and Mark Joffe, Richard Julie, Seth and Emily Karzen, Barry and Reiko Kayne, Karen Kegelman, Judge Charles and Barbara Kelly, Stephen Kelly, Daniel Klein, Shirley P. Klein, Frances and Steven Klein, Eileen Knick, LARRY and Janet Koch, Karen and John Kohn, Carol Kreston, Mr. and Mrs. Daniel Kristol, Howard and Shelly Kristol, Mr. and Mrs. Raymond Kursh, Rhonda and Larry Kuz and Le. Lessner, Alan Bruce Levin, Lisa, Marilyn and Richard Levin, Lawrence Levine, Richard A. Levine, Sally Levine, Roger and Danna Levy, Lynne and Jeff Lew, Paul and Rhonda Luboff, Midge and Paul Luchman and Marcy Margolin, Scott Margolin, Steven and Heather Margolin, Mrs. Elaine Markell, Dr. and Mrs. Mark and Miriam Markovitz, Ba McGettigan, Judy F. Melman, Bob and Ellen Meyer, Janet Meyerson, Barbara L. Miller, Dr. Elinor and Dr. Fred Mintz, Edy Mintz, Martha Moffat, Lelaine E. Nemser, Leslie H. Newman, Arnie and Bastian Parsons, Donald and Ethel Parsons, Suzanne Z. Paul, Stephen and Ellen Pearlman, Nan and Hal Pezzner, Gail Pietrzyk, Bob and Kate Pincus, Andrew Pizor, Drs. Richard and Irene Plotzker, David Lee Preston, Mara Raslin, Ernest Reiver and daughter, Barbara, Gerald and Ellen Resnick, Jay Resnick and Judy Sarubin, Marcy Resnick, Celina G. and Ronald S. Riebman, Rabbi Yair Robinson, Dr. and Mrs. Leonard Rosenbaum, Max and Judith Rosenberg, Steven S. Ross, Ms. Beth Dickhaus and Mr. Darrin Sacks, David and Marianne Sacks, Charles and Susan Salkin, Michele Sands, Victoria Sankey, Bruce Saran and Robin Kauffman Saran, Dr. Elaine Schmerling and Dr. Warren Butt, Barbara Schoenberg, David and Leah Schutzman, Jeff and Dianne Seidel, Phyllis Seidel, Janice Selekman, Dr. Leonard and Judith Seltzer, Linda Jaffe Sereduke, Nancy Sherr, Ruth Siegel, Barbara C. Siegell, Michelle and Russell Silberglied, Robert and Robin Silver Zink, Winnie Silver, Glenn and Laurie Selber Silverstein, Chick and Sherry Simmons, Dr. and Mrs. Arnold Sindler, Diane R. Sklut, G.J. Sloan, Dr. Edward and Anita Sobel, Terry Feinberg Spodick, Bruce Staggart, Richard Stat, Howard and Deborah Stromwasser, Michael and Connie Sugarman, Leonard Togman, Gerald C. and Sandye Turnauer, Mark and Sylvia Wagman, Lawrence A. Wainer, N. Howard and Eva Weissman, Stuart Widom, David Wilk, Diane Wolf and Lew Bennett, Rebecca Wolf-Prusan, Melyvn Woloshin, Barbara Yalisove, H. Alan Young, Toni Young, Rabbi Edward Zerin, Peter Zoll, Dr. and Mrs. Howard Zucker, Larry and Joyce Zutz

Thank you to all our members and donors!

And finally, we thank you – our members and donors – for supporting our work.

Please share our mailings and newsletters with your friends, family and colleagues and encourage them to visit our website, follow us on social media, and – yes, become members of the Jewish Historical Society of Delaware.

I hope that next year the print on this slide will be much smaller and the lines much closer together to accommodate all the added names of our new members and contributors!

Thank you again for your support and thank you for your attention!

Please feel free to contact me with any questions or comments:

Paula Gordon

Treasurer, Jewish Historical Society of Delaware

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Mailing address: 515 N. Market St., Wilmington, DE 19801

Checks to Jewish Historical Society of Delaware (if for the Endowment, note "Endowment" in memo).

Our membership form can be downloaded here:

<https://jhsdelaware.org/wp-content/uploads/2021/11/Membership-form-2021-1.pdf>

Online membership and tribute donations (unrestricted, programs and operating expenses):

<https://www.degives.org/orgs/jewish-historical-society-of-delaware>

Donate to the JHSD Endowment Fund online (restricted, will be transferred to our JFF fund with JFD):

<https://www.degives.org/fundraisers/JHSD-Coxe-House>