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Form 990



Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047

2010

Open to Public Inspection

A For the 2010 calendar year, or tax year beginning 06-01-2010 and ending 05-31-2011

B Check if applicable

☐ Address change

☐ Name change

☐ Initial return

☐ Terminated

☐ Amended return

☐ Application pending

C Name of organization

SARASOTA-MANATEE JEWISH FEDERATION INC

Doing Business As

Number and street (or P O box if mail is not delivered to street address)

Room/suite

580 S MCINTOSH ROAD

City or town, state or country, and ZIP + 4

SARASOTA, FL 34232

F Name and address of principal officer

HOWARD TEVLOWITZ

580 S MCINTOSH ROAD

SARASOTA, FL 34232

H(a) Is this a group return for affiliates?

☐ Yes

☒ No

H(b) Are all affiliates included?

☐ Yes

☐ No

If "No," attach a list (see instructions)

H(c) Group exemption number

I Tax-exempt status

☒ 501(c)(3)

☐ 501(c) ()

☐ (Insert no)

☐ 4947(a)(1) or

☐ 527

J Website: WWW SMJF ORG

K Form of organization

☒ Corporation

☐ Trust

☐ Association

☐ Other

L Year of formation 1970

M State of legal domicile FL

Part I	Summary																																
Activities & Governance	1 Briefly describe the organization’s mission or most significant activities THE SARASOTA-MANATEE JEWISH FEDERATION AWARDS GRANTS, MAKES ALLOCATIONS, AND ENGAGES IN PARTNERSHIPS WHICH SUPPORT HUMAN, SOCIAL SERVICE AND RELIGIOUS ACTIVITIES, AND EDUCATIONAL PROGRAMMING, LOCALLY AND WORLDWIDE THE FEDERATION FOCUSES ON JEWISH CONTINUITY(SUSTAINING AND ENRICHING OUR JEWISH COMMUNITY AND CREATING THE NEXT GENERATION OF JEWS), SAFETY NET (ENSURING THAT BASIC NEEDS SUCH AS FOOD AND SHELTER ARE MET, AND WORKING FOR THE SOCIAL, EMOTIONAL AND FINANCIAL WELL-BEING OF JEWS EVERYWHERE), AND BUILDING JEWISH COMMUNITY (ENABLING JEWS OF ALL AGES AND LEVELS OF AFFILIATION, THROUGH PROGRAMS AND SERVICES, TO LEAD COMMITTED JEWISH LIVES)																																
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets																																
	<table><tr><td>3</td><td>Number of voting members of the governing body (Part VI, line 1a)</td><td>3</td><td>39</td></tr><tr><td>4</td><td>Number of independent voting members of the governing body (Part VI, line 1b)</td><td>4</td><td>39</td></tr><tr><td>5</td><td>Total number of individuals employed in calendar year 2010 (Part V, line 2a)</td><td>5</td><td>19</td></tr><tr><td>6</td><td>Total number of volunteers (estimate if necessary)</td><td>6</td><td>225</td></tr><tr><td>7a</td><td>Total unrelated business revenue from Part VIII, column (C), line 12</td><td>7a</td><td>191,625</td></tr><tr><td>7b</td><td>Net unrelated business taxable income from Form 990-T, line 34</td><td>7b</td><td>-119,911</td></tr></table>	3	Number of voting members of the governing body (Part VI, line 1a)	3	39	4	Number of independent voting members of the governing body (Part VI, line 1b)	4	39	5	Total number of individuals employed in calendar year 2010 (Part V, line 2a)	5	19	6	Total number of volunteers (estimate if necessary)	6	225	7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	191,625	7b	Net unrelated business taxable income from Form 990-T, line 34	7b	-119,911								
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Part II

Signature Block

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than officer) is based on all information of which preparer has any knowledge.

Sign Here

Signature of officer

2012-03-22

Date

HOWARD TEVLOWITZ EXECUTIVE DIRECTOR

Type or print name and title

Print/Type preparer's name

REBECCA U STONER

Preparer's signature

REBECCA U STONER

Date

Check if self-employed ☐

PTIN

Firm's name

KERKERING BARBERIO & CO

Firm's EIN

Firm's address

PO BOX 49348

SARASOTA, FL 342306348

Phone no

(941) 365-4617

May the IRS discuss this return with the preparer shown above? (see instructions)

☒ Yes

☐ No

For Paperwork Reduction Act Notice, see the separate instructions.

Cat No 11282Y

Form 990 (2010)

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III

☐

☒

1

Briefly describe the organization’s mission

ENSURE THE CONTINUITY OF THE JEWISH PEOPLE, ENHANCE THE QUALITY OF JEWISH LIFE AND BUILD A STRONG, SECURE AND UNIFIED JEWISH COMMUNITY IN SARASOTA-MANATEE, IN ISRAEL AND THROUGHOUT THE WORLD THE FEDERATION ADVANCES THIS MISSION WITH ITS PARTNER NETWORK BY 1 MEETING THE HUMAN NEEDS OF THE SARASOTA-MANATEE JEWISH COMMUNITY AND OF FELLOW JEWS WORLD-WIDE,2 PROMOTING A POSITIVE JEWISH IDENTITY,3 SUPPORTING ISRAEL,4 INVOLVING AND BUILDING COMMUNITY AMONG THE JEWS OF SARASOTA-MANATEE,5 STRENGTHENING TIES BETWEEN THE SARASOTA-MANATEE JEWISH COMMUNITY AND THE BROADER SOCIETY IN WHICH IT EXISTS

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ?

☐ Yes

☒ No

If “Yes,” describe these new services on Schedule O

3

Did the organization cease conducting, or make significant changes in how it conducts, any program services?

☐ Yes

☒ No

If “Yes,” describe these changes on Schedule O

4

Describe the exempt purpose achievements for each of the organization’s three largest program services by expenses

Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a	(Code) (Expenses \$ 1,753,257 including grants of \$) (Revenue \$ 36,640)
ISRAEL, OVERSEAS, ADVOCACY AND COMMUNITY RELATIONS THE FEDERATION WORKS TO ADDRESS HUMAN AND EDUCATIONAL NEEDS IN ISRAEL, THE FORMER SOVIET UNION, POLAND AND NEARLY 60 COUNTRIES AROUND THE WORLD LOCALLY, THE FEDERATION CONDUCTS OUTREACH WITHIN THE JEWISH AND GENERAL COMMUNITIES, FOSTERING ISRAEL EDUCATION AND AWARENESS AND PROVIDES A FORUM FOR DEALING WITH ANTI-SEMITISM EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE YOUTH FUTURES THE SARASOTA-MANATEE JEWISH FEDERATION SUPPORTS THE JEWISH AGENCY FOR ISRAEL'S YOUTH FUTURES PROGRAM, WHICH EMPOWERS CHILDREN AND YOUTH FROM DISADVANTAGED REGIONS TO REALIZE THEIR POTENTIAL BY ENRICHING THEIR LIVES EDUCATIONALLY, CULTURALLY AND SOCIALLY THROUGH PERSONALIZED INTERVENTION, MENTORSHIP AND CRISIS MANAGEMENT YOUTH FUTURES INTRODUCES A PERSONAL MENTOR (TRUSTEE) INTO THE LIVES OF THESE CHILDREN THESE TRUSTEES UNDERGO TRAINING TO ASSIST THEM WITH THEIR TASK OF ASSESSING THE CHILDREN THEY ARE ASSIGNED TO, AND TAILORING AN INTERVENTION PLAN FOR EACH CHILD MICHAEL LEVIN MEMORIAL CENTER FOR LONE SOLDIERS THE SARASOTA-MANATEE JEWISH FEDERATION SUPPORTS THE CENTER, WHICH PROVIDES GUIDANCE AND SUPPORT TO YOUNG IMMIGRANTS TO ISRAEL WHO COME ALONE WITHOUT THEIR FAMILIES, AND ARE OFTEN IN NEED OF EMOTIONAL, SOCIAL, AND PHYSICAL SUPPORT IN THE MONTHS FOLLOWING THEIR ARRIVAL THESE YOUNG ADULTS HAVE MADE ALIYAH TO ISRAEL, MANY UPON GRADUATION FROM HIGH SCHOOL OR COLLEGE OVER 5,000 LONE SOLDIERS ARE IN THE IDF THERE ARE ALSO HUNDREDS OF ISRAEL YOUTH, LESS THAN 18 YEARS OLD, WHO DUE TO IDEOLOGICAL OR ECONOMIC REASONS NO LONGER RESIDE WITH THEIR PARENTS THAT RECEIVE SUPPORT FROM THE CENTER ISRAEL TENNIS CENTER THE ISRAEL TENNIS CENTER IS THE LARGEST TENNIS PROGRAM FOR CHILDREN IN THE WORLD IT OPERATES 14 CENTERS, LOCATED PRIMARILY IN UNDERPRIVILEGED COMMUNITIES, USING TENNIS TO PROMOTE THE SOCIAL, PHYSICAL AND PSYCHOLOGICAL WELL-BEING OF THEIR STUDENTS THE SARASOTA-MANATEE JEWISH FEDERATION, IN PARTNERSHIP WITH THE MARCI LYNN BERNSTEIN PHILANTHROPIC FUND OF THE UNITED JEWISH FEDERATION FOUNDATION OF GREATER PITTSBURGH, SUPPORTS THE CENTER'S COUPLES COEXISTENCE PROGRAM, WHERE ARAB AND JEWISH CHILDREN WORK TOGETHER TO LEARN THE VALUES OF TOLERANCE AND COOPERATION THROUGH SPORTS AND FITNESS TRAINING THE HELLER ISRAEL ADVOCACY INITIATIVE ADVOCATES FOR PEACE AND SECURITY IN ISRAEL THROUGH EDUCATION, INFORMATION AND COMMUNITY AWARENESS, RAISING CONSCIOUSNESS OF, AND ACTIVELY CONFRONTING ANTI-SEMITISM ON A GLOBAL LEVEL, AND, DIRECTLY ADDRESSING ANTI-ISRAEL ACTIVITIES IN SARASOTA-MANATEE	

4b	(Code) (Expenses \$ 1,124,721 including grants of \$) (Revenue \$ 428,674)
JEWISH EDUCATION AND PROGRAMMING THE FEDERATION, IN COOPERATION WITH AREA SYNAGOGUES AND ORGANIZATIONS, OFFERS A RANGE OF INSPIRING OPPORTUNITIES THAT ENABLE TEENAGERS, ADULTS AND FAMILIES TO BECOME CONFIDENT AND COMFORTABLE LIFELONG JEWISH LEARNERS THE FEDERATION PROVIDES A WIDE RANGE OF JEWISH PROGRAMS THROUGHOUT THE TWO-COUNTY AREA THIS CATEGORY INCLUDES PROGRAMS CELEBRATING JEWISH HOLIDAYS, OUTREACH EFFORTS TO THE UNAFFILIATED AND ADULT PROGRAMS FOR ALL AGES AND INTERESTS EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE THE FLORENCE MELTON COMMUNITEEN HIGH SCHOOL IS A TEXT-BASED, PLURALISTIC, STUDENT-CENTERED CURRICULUM IN A TWO-YEAR PROGRAM FOR POST-BAR AND -BAT MITZVAH JEWISH TEENS NO HOMEWORK AND NO TESTS, STUDENTS RECEIVE A CERTIFICATE ON COMPLETION OF THE PROGRAM OPEN TO ALL JEWISH TEENS REGARDLESS OF AFFILIATION, GRADES 9-12 A COURSE FOR EIGHTH GRADERS, CONNECTING TO COMMUNITEEN, IS ALSO AVAILABLE THE FLORENCE MELTON ADULT MINI-SCHOOL, A PROJECT OF THE HEBREW UNIVERSITY OF JERUSALEM, ENABLES JEWISH LEARNERS FROM ALL BACKGROUNDS TO LEARN ABOUT JEWISH TRADITIONS AND CULTURE IN A CHALLENGING AND INSPIRING COURSE OF STUDY MEETS FOR TWO HOURS WEEKLY, FOR 30 WEEKS PER YEAR, FOR TWO YEARS GRADUATE CLASS OPPORTUNITIES ALSO OFFERED FEDERATION-SPONSORED COMMUNITY-WIDE EDUCATIONAL PROGRAMS ENSURE A STRONG JEWISH IDENTITY AND TO HELP BUILD A DYNAMIC AND ENGAGED JEWISH COMMUNITY FOR GENERATIONS TO COME PROGRAMS FEATURE SPEAKERS ON A WIDE VARIETY OF TOPICS THE FEDERATION'S PJ LIBRARY PROGRAM HAS ENABLED OVER 215 FAMILIES WITH CHILDREN AGES 6 MONTHS TO 8 YEARS TO RECEIVE A MONTHLY MAILING OF JEWISH CHILDREN'S BOOKS, CDS, OR THE OCCASIONAL PARENT BOOK, FOR ONE YEAR EACH BOOK AND CD CAME WITH GUIDES TO HELP FAMILIES USE THE SELECTION IN THEIR HOMES BOOK AND MUSIC LISTS WERE CHOSEN BY THE FOREMOST EARLY-CHILDHOOD EXPERTS THE LIST INCLUDES THEMES SUCH AS JEWISH HOLIDAYS, FOLKTALES AND JEWISH FAMILY LIFE THE FEDERATION HONORS ITS COMMITMENT TO HOLOCAUST EDUCATION THROUGH THE GENERATIONS AFTER GROUP, AN ORGANIZATION OF DESCENDANTS OF HOLOCAUST SURVIVORS WHO WISH TO EDUCATE THIS AND FUTURE GENERATIONS BY PRESERVING THE MEMORIES OF THE PAST, A SPEAKERS BUREAU TO ADDRESS ISSUES PERTAINING TO HOLOCAUST EDUCATION, THE ANNUAL HOLOCAUST SURVIVORS LUNCHEON, FEDERATION-SPONSORED HOLOCAUST EDUCATION PROGRAMS THROUGHOUT THE COMMUNITY, INCLUDING AN ANNUAL EVENT IN PARTNERSHIP WITH THE UNITED STATES HOLOCAUST MUSEUM, AND THE ANNUAL YOM HASHOAH HOLOCAUST REMEMBRANCE DAY PROGRAM JEWISH SUMMER CAMP SCHOLARSHIPS STUDIES HAVE PROVEN, OVERWHELMINGLY, THAT JEWISH CAMPING EXPERIENCES SERVE AS A CRITICAL TOOL IN JEWISH CONTINUITY EFFORTS IN AN EFFORT TO ENCOURAGE AREA FAMILIES TO SEND THEIR CHILDREN TO JEWISH CAMPS, THE SARASOTA-MANATEE JEWISH FEDERATION, WITH THE FINANCIAL ASSISTANCE OF THE SALLY FINE FUND FOR OVERNIGHT CAMPING AND GENEROUS AREA DONORS, AWARDED \$51,792 IN INCENTIVE GRANTS IN 2010-11 WITH THE FINANCIAL ASSISTANCE OF THE FEDERATION, 75 CHILDREN FROM SARASOTA-MANATEE ATTENDED JEWISH OVERNIGHT CAMPS SUCH AS CAMP RAMAH DAROM, CAMP BARNEY MEDINTZ, CAMP GAN ISRAEL, CAMP COLEMAN, EMMA KAUFMANN AND CAMP AVODA IN ADDITION, ANOTHER \$10,000 WAS AWARDED TO 67 CAMPERS ATTENDING AREA JEWISH DAY CAMPS AT LOCAL SYNAGOGUES THE FEDERATION SPONSORS ADULT GROUPS SUCH AS JFED SINGLES, A GROUP FOR SINGLES, AND BOOMERS+, A SOCIAL GROUP FOR ACTIVE SENIORS, SO THAT PARTICIPANTS CAN GATHER WITH OTHER JEWS WITH SIMILAR INTERESTS NASHIM L'TOVA, FEDERATION'S WOMEN'S OUTREACH GROUP, OFFERS PROGRAMS SPECIFICALLY GEARED TOWARD WOMEN, INCLUDING THE ANNUAL WOMEN'S DAY, THE WOMEN'S PASSOVER CELEBRATION, AND NEWCOMER PROGRAMS THE FEDERATION PROVIDES FUNDING AND PROFESSIONAL SUPPORT FOR HILLEL PROGRAMS ON LOCAL COLLEGE CAMPUSES	

4c	(Code) (Expenses \$ 555,352 including grants of \$) (Revenue \$ 10,948)
SARASOTA-MANATEE JEWISH SAFETY NET PROGRAMS THE FEDERATION WORKS TO ENSURE THAT BASIC NEEDS SUCH AS FOOD AND SHELTER ARE MET, AS WE WORK FOR THE SOCIAL, EMOTIONAL AND FINANCIAL WELL-BEING OF JEWS IN SARASOTA-MANATEE EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE JEWISH HEALING PROGRAM THE FEDERATION PROVIDES A SIGNIFICANT PORTION OF THE FUNDING FOR THE JEWISH HEALING PROGRAM, WHICH IS IMPLEMENTED BY JFCS IN 2010-2011, 100 VOLUNTEERS EACH MONTH PROVIDED DIRECT COMMUNITY SERVICES TO THE JEWISH COMMUNITY, INCLUDING BIKKOR CHOLIM (VISIT THE SICK), BEREAVEMENT SERVICES, COMMUNITY RELIGIOUS OUTREACH (TO SENIORS IN NURSING HOMES AND ASSISTED LIVING FACILITIES), AND DOULA (END-OF-LIFE) SERVICES MORE THAN 4,900 CONTACTS WERE MADE WITH THE JEWISH COMMUNITY, HELPING THE MOST AT-RISK AND ISOLATED TO RECEIVE SPIRITUAL GUIDANCE AND MUCH-NEEDED HUMAN CONTACT DRESS UP FOR YONTIF IN 2010-2011, THE FEDERATION SPONSORED AND IMPLEMENTED THE DRESS UP FOR YONTIF PROGRAM, DURING THE HIGH HOLIDAYS (ROSH HASHANAH AND YOM KIPPUR) AND PASSOVER PARTICIPANTS INCLUDED SENIORS PARTICIPATING IN THE JFCS "SENIOR OUTREACH SERVICES" PROGRAM, RESIDENTS OF KOBERNICK HOUSE (INDEPENDENT LIVING) AND ANCHIN PAVILION (ASSISTED LIVING), AND RUSSIAN FAMILIES THE PROGRAM INCLUDES RELIGIOUS SERVICES AND NEW OUTFITS FOR THE PARTICIPANTS COMMUNITY EMERGENCY ASSISTANCE FUND THE FEDERATION PROVIDES EMERGENCY FUNDING FOR LOCAL JEWISH FAMILIES IN NEED FOR RENT, UTILITIES AND FOOD THE PROGRAM IS ADMINISTERED THROUGH JEWISH FAMILY AND CHILDREN'S SERVICE CARING FOR THE JEWISH ELDERLY THE FEDERATION PROVIDES BASIC HUMAN NEEDS SUCH AS FOOD, MEDICINES AND HOME CARE FOR THOUSANDS OF ELDERLY JEWS IN THE FORMER SOVIET UNION RECEIVE THROUGH THE JEWISH JOINT DISTRIBUTION COMMITTEE EDUCATIONAL INTERVENTION PROGRAM THE FEDERATION PROVIDES FUNDING FOR DIAGNOSTIC TESTING TO GUARANTEE THAT SEVERELY ABUSED AND NEGLECTED CHILDREN IN ISRAEL RECEIVED THE SERVICES THAT MEET WITH THEIR INDIVIDUAL EDUCATIONAL NEEDS THROUGH A PARTNERSHIP WITH ORR SHALOM, DOZENS OF CHILDREN RECEIVE TESTING AND REMEDIAL TEACHING, WHERE NECESSARY	

4d

Other program services (Describe in Schedule O) See also Additional Data for Description

(Expenses \$ 269,737 including grants of \$) (Revenue \$ 298)

4e

Total program service expenses➤\$ 3,703,067

Part IV

Checklist of Required Schedules

		Yes	No
1	Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? <i>If "Yes," complete Schedule A.</i> 	1	Yes
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instruction)? 	2	Yes
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? <i>If "Yes," complete Schedule C, Part I.</i>	3	No
4	Section 501(c)(3) organizations. Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? <i>If "Yes," complete Schedule C, Part II.</i>	4	No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? <i>If "Yes," complete Schedule C, Part III.</i>	5	
6	Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? <i>If "Yes," complete Schedule D, Part I.</i> 	6	Yes
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? <i>If "Yes," complete Schedule D, Part II.</i> 	7	No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? <i>If "Yes," complete Schedule D, Part III.</i> 	8	No
9	Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? <i>If "Yes," complete Schedule D, Part IV.</i> 	9	No
10	Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? <i>If "Yes," complete Schedule D, Part V.</i> 	10	Yes
11	If the organization's answer to any of the following questions is 'Yes,' then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? <i>If "Yes," complete Schedule D, Part VI.</i> 	11a	Yes
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VII.</i> 	11b	Yes
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part VIII.</i> 	11c	No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? <i>If "Yes," complete Schedule D, Part IX.</i> 	11d	No
e	Did the organization report an amount for other liabilities in Part X, line 25? <i>If "Yes," complete Schedule D, Part X.</i> 	11e	Yes
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? <i>If "Yes," complete Schedule D, Part X.</i> 	11f	No
12a	Did the organization obtain separate, independent audited financial statements for the tax year? <i>If "Yes," complete Schedule D, Parts XI, XII, and XIII.</i> 	12a	No
b	Was the organization included in consolidated, independent audited financial statements for the tax year? <i>If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional.</i> 	12b	No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? <i>If "Yes," complete Schedule E.</i>	13	No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? <i>If "Yes," complete Schedule F, Parts I and IV.</i> 	14b	Yes
15	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S ? <i>If "Yes," complete Schedule F, Parts II and IV.</i> 	15	No
16	Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S ? <i>If "Yes," complete Schedule F, Parts III and IV.</i> 	16	No
17	Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? <i>If "Yes," complete Schedule G, Part I (see instructions).</i> 	17	Yes
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? <i>If "Yes," complete Schedule G, Part II.</i> 	18	Yes
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? <i>If "Yes," complete Schedule G, Part III.</i> 	19	No
20a	Did the organization operate one or more hospitals? <i>If "Yes," complete Schedule H.</i>	20a	No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? Note. Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions)	20b	

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i>	21	Yes	
22	Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i>	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i>	23	Yes	
24a	Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b–24d and complete Schedule K. If "No," go to line 25</i>	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	Section 501(c)(3) and 501(c)(4) organizations. Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i>	25a		No
b	Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>	25b		No
26	Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i>	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i>	27		No
28	Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)			
a	A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>	32		No
33	Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>	33		No
34	Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i>	34		No
35	Is any related organization a controlled entity within the meaning of section 512(b)(13)?	35		No
a	Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> ☐ Yes ☒ No			
36	Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>	36		No
37	Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? Note. All Form 990 filers are required to complete Schedule O	38	Yes	

Part V Statements Regarding Other IRS Filings and Tax Compliance			
Check if Schedule O contains a response to any question in this Part V ☐			
		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.		
	1a61		
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.		
	1b0		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	1c	Yes
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements filed for the calendar year ending with or within the year covered by this return.		
	2a19		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns?	2b	Yes
Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).			
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	Yes
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.	3b	Yes
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?	4a	No
b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?	5a	No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?	5b	No
c	If "Yes" to line 5a or 5b, did the organization file Form 8886-T?	5c	
6a	Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?	6a	No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?	6b	
7 Organizations that may receive deductible contributions under section 170(c).			
a	Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?	7a	No
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?	7c	No
d	If "Yes," indicate the number of Forms 8282 filed during the year.	7d	
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	7e	No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	7f	No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?	7g	
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	
8	Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?	8	No
9 Sponsoring organizations maintaining donor advised funds.			
a	Did the organization make any taxable distributions under section 4966?	9a	No
b	Did the organization make a distribution to a donor, donor advisor, or related person?	9b	No
10 Section 501(c)(7) organizations. Enter			
a	Initiation fees and capital contributions included on Part VIII, line 12.	10a	
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.	10b	
11 Section 501(c)(12) organizations. Enter			
a	Gross income from members or shareholders.	11a	
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).	11b	
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?	12a	
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.	12b	
13 Section 501(c)(29) qualified nonprofit health insurance issuers.			
a	Is the organization licensed to issue qualified health plans in more than one state? Note. See the instructions for additional information the organization must report on Schedule O.	13a	
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.	13b	
c	Enter the amount of reserves on hand.	13c	
14a	Did the organization receive any payments for indoor tanning services during the tax year?	14a	No
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.	14b	

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.
Check if Schedule O contains a response to any question in this Part VI

Section A. Governing Body and Management			Yes	No
1a	Enter the number of voting members of the governing body at the end of the tax year	39		
b	Enter the number of voting members included in line 1a, above, who are independent	39		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	2	Yes	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	Yes	
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5		No
6	Does the organization have members or stockholders?	6		No
7a	Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?	7a		No
b	Are any decisions of the governing body subject to approval by members, stockholders, or other persons?	7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following			
a	The governing body?	8a	Yes	
b	Each committee with authority to act on behalf of the governing body?	8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O	9		No

Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.)			Yes	No
10a	Does the organization have local chapters, branches, or affiliates?	10a		No
b	If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?	10b		
11a	Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990			
12a	Does the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes	
b	Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done	12c	Yes	
13	Does the organization have a written whistleblower policy?	13	Yes	
14	Does the organization have a written document retention and destruction policy?	14	Yes	
15	Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b	Yes	
	If "Yes" to line 15a or 15b, describe the process in Schedule O (See instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure	
17	List the States with which a copy of this Form 990 is required to be filedFL
18	Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply. ☐ Own website ☐ Another's website ☒ Upon request
19	Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.
20	State the name, physical address, and telephone number of the person who possesses the books and records of the organization. INNA SIDEMAN 580 S MCINTOSH ROAD SARASOTA, FL 34232 (941) 371-4546

Check if Schedule O contains a response to any question in this Part VII ☐ ☒

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation, and **current** key employees Enter -0- in columns (D), (E), and (F) if no compensation was paid
- List all of the organization's **current** key employees, if any See instructions for definition of "key employee "
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations
- List all of the organization's **former** officers, key employees, and highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations

List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

[illegible]

Part VII

2	Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization	2
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Section B. Independent Contractors

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization		
(A) Name and business address	(B) Description of services	(C) Compensation
RICHARD BERGMAN 1350 MAIN ST SUITE 902 SARASOTA, FL 34236	DONOR DEVELOPMENT	119,527
2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ▶1		

Part VIII

Statement of Revenue

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514	
Contributions, gifts, grants and other similar amounts	1a	Federated campaigns	1a				
	b	Membership dues	1b				
	c	Fundraising events	1c	126,156			
	d	Related organizations	1d				
	e	Government grants (contributions)	1e				
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	4,010,752			
	g	Noncash contributions included in lines 1a-1f \$		297,887			
	h	Total. Add lines 1a-1f		4,136,908			
	Program Service Revenue			Business Code			
2a		EDUCATIONAL PROGRAMMIN	900099	111,950	111,950		
b		BOB MALKIN YOUNG AMBAS	900099	63,214	63,214		
c		FLORENCE MELTON SCHOOL	900099	39,144	39,144		
d		PJ LIBRARY	900099	35,987	35,987		
e		MARCH OF THE LIVING	900099	26,640	26,640		
f		All other program service revenue		199,327	199,327		
g		Total. Add lines 2a-2f		476,262			
Other Revenue		3	Investment income (including dividends, interest and other similar amounts)				
				30,293		30,293	
	4	Income from investment of tax-exempt bond proceeds . . .					
	5	Royalties					
	6a	(i) Real		(ii) Personal			
		244,548					
		57,088					
		187,460					
		Net rental income or (loss)			187,460		187,460
	7a	(i) Securities		(ii) Other			
		318,822					
		310,393					
		8,429					
		Net gain or (loss)			8,429		8,429
	8a	Gross income from fundraising events (not including \$ 126,156 of contributions reported on line 1c) See Part IV, line 18					
		a		43,575			
		b Less direct expenses		b	157,892		
		Net income or (loss) from fundraising events . . .			-114,317		-114,317
	9a	Gross income from gaming activities See Part IV, line 19 . . .		a			
		b Less direct expenses		b			
Net income or (loss) from gaming activities . . .							
10a	Gross sales of inventory, less returns and allowances		a				
	b Less cost of goods sold		b				
	Net income or (loss) from sales of inventory . . .						
Miscellaneous Revenue		Business Code					
11a	ADVERTISING		541800	191,625		191,625	
	b OTHER SUPPORT REVENUE		900099	298	298		
	c						
	d All other revenue						
	e Total. Add lines 11a-11d			191,923			
12	Total revenue. See Instructions			4,916,958	476,560	191,625	111,865

Part IX

Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the U S See Part IV, line 21	1,659,751	1,659,751		
2	Grants and other assistance to individuals in the U S See Part IV, line 22	124,939	124,939		
3	Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	343,079	219,910	88,862	34,307
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7	Other salaries and wages	742,837	578,524	38,551	125,762
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	56,282	44,531	1,875	9,876
9	Other employee benefits	154,031	116,246	13,297	24,488
10	Payroll taxes				
a	Fees for services (non-employees)				
	Management				
b	Legal	28,406		28,406	
c	Accounting	32,370		32,370	
d	Lobbying				
e	Professional fundraising services See Part IV, line 17	127,069			127,069
f	Investment management fees	21,086		21,086	
g	Other	6,223		6,223	
12	Advertising and promotion	48,843			48,843
13	Office expenses	41,677	30,839	4,587	6,251
14	Information technology	20,093	14,869	2,210	3,014
15	Royalties				
16	Occupancy	65,523	48,487	7,208	9,828
17	Travel				
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	22,689	16,790	2,496	3,403
20	Interest				
21	Payments to affiliates				
22	Depreciation, depletion, and amortization	173,182	128,155	19,050	25,977
23	Insurance	24,529	18,152	2,698	3,679
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24f If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O)				
a	COMMUNITY PROGRAMS	553,510	553,510		
b	NEWSPAPER PRODUCTION	141,676	95,291	46,385	
c	BLDG & GROUNDS MAINTENA	42,827	31,692	4,711	6,424
d	MISCELLANEOUS	26,826	19,851	2,951	4,024
e	DUES & SUBSCRIPTIONS	2,067	1,530	227	310
f	All other expenses				
25	Total functional expenses. Add lines 1 through 24f	4,459,515	3,703,067	323,193	433,255
26	Joint costs. Check here ☐ if following SOP 98-2 (ASC 958-720) Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation				

Part X

Balance Sheet

					(A)		(B)
					Beginning of year		End of year
Assets	1	Cash—non-interest-bearing			300	1	299
	2	Savings and temporary cash investments			2,207,239	2	2,111,038
	3	Pledges and grants receivable, net			818,453	3	737,175
	4	Accounts receivable, net			18,491	4	12,650
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L				5	
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers, and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions). Schedule L				6	
	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use				8	
	9	Prepaid expenses and deferred charges			106,727	9	99,933
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a	7,533,804			
	b	Less: accumulated depreciation	10b	3,160,850	4,540,586	10c	4,372,954
	11	Investments—publicly traded securities			1,823,043	11	2,073,795
	12	Investments—other securities. See Part IV, line 11			10,349,905	12	12,223,625
	13	Investments—program-related. See Part IV, line 11				13	
	14	Intangible assets				14	
	15	Other assets. See Part IV, line 11			248,257	15	235,810
	16	Total assets. Add lines 1 through 15 (must equal line 34)			20,113,001	16	21,867,279
Liabilities	17	Accounts payable and accrued expenses			160,669	17	93,340
	18	Grants payable			105,345	18	94,069
	19	Deferred revenue				19	
	20	Tax-exempt bond liabilities				20	
	21	Escrow or custodial account liability. Complete Part IV of Schedule D				21	
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L				22	
	23	Secured mortgages and notes payable to unrelated third parties				23	
	24	Unsecured notes and loans payable to unrelated third parties				24	
	25	Other liabilities. Complete Part X of Schedule D			1,098,844	25	1,064,307
	26	Total liabilities. Add lines 17 through 25			1,364,858	26	1,251,716
Net Assets or Fund Balances		Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.					
	27	Unrestricted net assets			12,283,382	27	14,150,802
	28	Temporarily restricted net assets			1,402,854	28	1,504,972
	29	Permanently restricted net assets			5,061,907	29	4,959,789
		Organizations that do not follow SFAS 117, check here ☐ and complete lines 30 through 34.					
	30	Capital stock or trust principal, or current funds				30	
	31	Paid-in or capital surplus, or land, building or equipment fund				31	
	32	Retained earnings, endowment, accumulated income, or other funds				32	
	33	Total net assets or fund balances			18,748,143	33	20,615,563
	34	Total liabilities and net assets/fund balances			20,113,001	34	21,867,279

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response to any question in this Part XI ☒

1	Total revenue (must equal Part VIII, column (A), line 12)	1	4,916,958
2	Total expenses (must equal Part IX, column (A), line 25)	2	4,459,515
3	Revenue less expenses Subtract line 2 from line 1	3	457,443
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	18,748,143
5	Other changes in net assets or fund balances (explain in Schedule O)	5	1,409,977
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	20,615,563

Part XII Financial Statements and Reporting

Check if Schedule O contains a response to any question in this Part XII ☒

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other _____ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		No
b	Were the organization's financial statements audited by an independent accountant?		No
c	If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O		
d	If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separated basis		
3a	As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133?		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

SCHEDULE A

(Form 990 or 990EZ)

Department of the Treasury
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

OMB No 1545-0047

2010

Open to Public
Inspection

Name of the organization SARASOTA-MANATEE JEWISH FEDERATION INC	Employer identification number 59-1227747
--	--

Part I

Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box)

- 1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**
- 2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E)
- 3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**
- 4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state
- 5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II)
- 6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**
- 7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II)
- 8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II)
- 9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III)
- 10

☐

An organization organized and operated exclusively to test for public safety See**section 509(a)(4).**
- 11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a

☐

Type I

b

☐

Type II

c

☐

Type III - Functionally integrated

d

☐

Type III - Other
- e

☐

By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)
- f

☐

If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box
- g

☐

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?

(i)

a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?

(ii)

a family member of a person described in (i) above?

(iii)

a 35% controlled entity of a person described in (i) or (ii) above?
- h

☐

Provide the following information about the supported organization(s)

	Yes	No
11g(i)		
11g(ii)		
11g(iii)		

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 9 above or IRC section (see instructions))	(iv) Is the organization in col (i) listed in your governing document?		(v) Did you notify the organization in col (i) of your support?		(vi) Is the organization in col (i) organized in the U S ?		(vii) Amount of support
			Yes	No	Yes	No	Yes	No	
Total									

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	5,884,552	5,270,744	5,025,531	3,537,808	4,136,908	23,855,543
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 Total. Add lines 1 through 3	5,884,552	5,270,744	5,025,531	3,537,808	4,136,908	23,855,543
5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)						1,259,772
6 Public Support. Subtract line 5 from line 4						22,595,771

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
7 Amounts from line 4	5,884,552	5,270,744	5,025,531	3,537,808	4,136,908	23,855,543
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	428,913	603,063	621,480	165,166	274,841	2,093,463
9 Net income from unrelated business activities, whether or not the business is regularly carried on	61,435	67,839	67,955	83,410	191,952	472,591
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV)	73,279	35,437	110,752	53,335	298	273,101
11 Total support (Add lines 7 through 10)						26,694,698
12 Gross receipts from related activities, etc (See instructions)					12	1,368,096
13 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here ▶						

Section C. Computation of Public Support Percentage		
14 Public Support Percentage for 2010 (line 6 column (f) divided by line 11 column (f))	14	84 650 %
15 Public Support Percentage for 2009 Schedule A, Part II, line 14	15	86 150 %
16a 33 1/3% support test—2010. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶		
b 33 1/3% support test—2009. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶		
17a 10%-facts-and-circumstances test—2010. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶		
b 10%-facts-and-circumstances test—2009. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶		
18 Private Foundation If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions ▶		

Part IIISupport Schedule for Organizations Described in Section 509(a)(2)
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) 	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")						
2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose						
3 Gross receipts from activities that are not an unrelated trade or business under section 513						
4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
5 The value of services or facilities furnished by a governmental unit to the organization without charge						
6 Total. Add lines 1 through 5						
7a Amounts included on lines 1, 2, and 3 received from disqualified persons						
b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year						
c Add lines 7a and 7b						
8 Public Support (Subtract line 7c from line 6)						

Section B. Total Support						
Calendar year (or fiscal year beginning in) 	(a) 2006	(b) 2007	(c) 2008	(d) 2009	(e) 2010	(f) Total
9 Amounts from line 6						
10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources						
b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975						
c Add lines 10a and 10b						
11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on						
12 Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)						
13 Total support (Add lines 9, 10c, 11 and 12.)						
14 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here 						

Section C. Computation of Public Support Percentage		
15 Public Support Percentage for 2010 (line 8 column (f) divided by line 13 column (f))	15	
16 Public support percentage from 2009 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2010 (line 10c column (f) divided by line 13 column (f))	17	
18 Investment income percentage from 2009 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2010. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization 		
b 33 1/3% support tests—2009. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and stop here . The organization qualifies as a publicly supported organization 		
20 Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions 		

Part IV

Supplemental Information. Supplemental Information. Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Additional Data

Software ID:

Software Version:

EIN: 59-1227747

Name: SARASOTA-MANATEE JEWISH FEDERATION INC

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)							(D) Reportable compensation from the organization (W- 2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099- MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former				
BARBARA ACKERMAN COMMITTEE CHAIR	1 00	X						0	0	0	
ALAN ADES COMMITTEE CHAIR	1 00	X						0	0	0	
RUTH ADES DIRECTOR	1 00	X						0	0	0	
GREG BAND DIRECTOR	1 00	X						0	0	0	
KAREN BERNSTEIN COMMITTEE CHAIR	1 00	X						0	0	0	
TOM BERNSTEIN DIRECTOR	1 00	X						0	0	0	
TERRY BLUMENSTEIN COMMITTEE CHAIR	1 00	X						0	0	0	
DAVID CHAIFETZ DIRECTOR	1 00	X						0	0	0	
GERARD DANIEL DIRECTOR	1 00	X						0	0	0	
ALAN GIDWITZ DIRECTOR	1 00	X						0	0	0	
HELEN GLASER DIRECTOR	1 00	X						0	0	0	
RABBI BRENNER GLICKMAN DIRECTOR	1 00	X						0	0	0	
RO Z GOLDBERG COMMITTEE CHAIR	1 00	X						0	0	0	
DAVID GRUBER COMMITTEE CHAIR	1 00	X						0	0	0	
LEWIS HANAN DIRECTOR	1 00	X						0	0	0	
BERNARD ISAACS COMMITTEE CHAIR	1 00	X						0	0	0	
ARNOLD KAPLAN DIRECTOR	1 00	X						0	0	0	
CLAIRE LEVIN COMMITTEE CHAIR	1 00	X						0	0	0	
ROSLYN MAZUR DIRECTOR	1 00	X						0	0	0	
DANIEL MILLER COMMITTEE CHAIR	1 00	X						0	0	0	
JANE ROBBINS COMMITTEE CHAIR	1 00	X						0	0	0	
IRENE ROSS DIRECTOR	1 00	X						0	0	0	
JOHN ROSENTHAL DIRECTOR	1 00	X						0	0	0	
ADAM SCHILDKRAUT COMMITTEE CHAIR	1 00	X						0	0	0	
MARK SCHLANGER COMMITTEE CHAIR	1 00	X						0	0	0	

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W- 2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
SAM SHAPIRO COMMITTEE CHAIR	1 00	X						0	0	0
RABBI HOWARD SIMON COMMITTEE CHAIR	1 00	X						0	0	0
ANNE STEIN DIRECTOR	1 00	X						0	0	0
BRUCE UDELL DIRECTOR	1 00	X						0	0	0
AMY WEINBERGER DIRECTOR	1 00	X						0	0	0
NELLE MILLER PRESIDENT	2 00	X		X				0	0	0
ISAAC AZERAD VICE PRESIDENT	2 00	X		X				0	0	0
JOSHUA GREEN VICE PRESIDENT	2 00	X		X				0	0	0
RACHEL SILVERMAN VICE PRESIDENT	2 00	X		X				0	0	0
BUNNY SKIRBOLL SECRETARY	2 00	X		X				0	0	0
NANCY SWART TREASURER	2 00	X		X				0	0	0
LOIS STULBERG VICE PRESIDENT	2 00	X		X				0	0	0
JOEL FEDDER PARLIAMENTARIAN	1 00	X		X				0	0	0
JUDY WEINSTEIN IMMEDIATE PAST PRESIDENT	1 00	X		X				0	0	0
HOWARD TEVLOWITZ EXECUTIVE DIRECTOR	50 00			X				176,214	0	34,613
INNA SIDEMAN CFO	50 00			X				97,952	0	15,359
MARTY HABERER ASST EXEC DIRECTOR	50 00					X		140,115	0	28,923

Form 990, Part III - 4 Program Service Accomplishments (See the Instructions)

4d. Other program services			
(Code	) (Expenses \$	269,737	) (Revenue \$ 298)
COLLABORATIVE PARTNERSHIPS THE FEDERATION WORKS WITH A WIDE RANGE OF COMMUNITY PARTNERS TO SUPPORT JEWISH-THEMED PROGRAMMING FOR THE ENTIRE COMMUNITY EXAMPLES OF SPECIFIC PROGRAMS FUNDED INCLUDE SARASOTA BALLET THE FEDERATION SPONSORED THE PERFORMANCE OF ANNE FRANK IN AN EFFORT TO TELL THE STORY OF THE HOLOCAUST TO THE GENERAL COMMUNITY THROUGH CULTURAL ARTS PROGRAMMING VAN WEZEL PERFORMING ARTS HALL THE FEDERATION SPONSORED THE PERFORMANCE OF THE GOLDA'S BALCONY, WHICH RECOUNTS THE LIFE OF GOLDA MEIR, ISRAEL'S FOURTH PRIME MINISTER THE PLAY, SET DURING THE 1973 YOM KIPPUR WAR, RECOUNTS ISRAEL'S STRUGGLE FOR SURVIVAL SARASOTA FILM FESTIVAL THROUGH ITS COLLABORATION WITH THE SARASOTA FILM FESTIVAL, THE FEDERATION SPONSORED A SHOWCASE OF SEVEN JEWISH OR ISRAELI THEMED FILMS AS PART OF THE 2011 FESTIVAL IN ADDITION, THE SARASOTA FILM FESTIVAL ASSISTED OUR FEDERATION IN SELECTED FILMS FOR OUR SECOND ANNUAL JEWISH FILM FESTIVAL HELD THIS YEAR EMBRACING OUR DIFFERENCES THE FEDERATION PARTNERS WITH COEXISTENCE, INC EACH YEAR TO PRESENT THIS INTERNATIONAL OUTDOOR ART EXHIBIT THE EXHIBIT PROMOTES THE VALUE OF DIVERSITY, THE BENEFIT OF INCLUSION AND THE SIGNIFICANCE OF THE ACTIVE REJECTION OF HATRED AND PREJUDICE PUBLIC SCHOOL CHILDREN, GRADES K-12, ARE TRANSPORTED TO THE EXHIBIT FOR FREE EACH YEAR SINCE 2004, MORE THAN 1,100,000 HAVE BENEFITTED FROM THIS FREE EDUCATIONAL PROGRAM			

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

▶ **Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.**
▶ **Attach to Form 990. ▶ See separate instructions.**

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization

SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number

59-1227747

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

	(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	31
2	Aggregate contributions to (during year)	489,023
3	Aggregate grants from (during year)	210,213
4	Aggregate value at end of year	1,121,994
5	Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? Yes No	
6	Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit? Yes No	

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)

☐ Preservation of an historically importantly land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2

Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

	Held at the End of the Year
a	Total number of conservation easements
b	Total acreage restricted by conservation easements
c	Number of conservation easements on a certified historic structure included in (a)
d	Number of conservation easements included in (c) acquired after 8/17/06

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ▶

4

Number of states where property subject to conservation easement is located ▶

5

Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

Yes No

6

Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ▶

7

Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ▶ \$

8

Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?

Yes No

9

In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a

If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1

▶ \$

(ii) Assets included in Form 990, Part X

▶ \$

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a

Revenues included in Form 990, Part VIII, line 1

▶ \$

b

Assets included in Form 990, Part X

▶ \$

For Privacy Act and Paperwork Reduction Act Notice, see the Intructions for Form 990

Cat No 52283D

Schedule D (Form 990) 2010

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐

Public exhibition

b

☐

Scholarly research

c

☐

Preservation for future generations

d

☐

Loan or exchange programs

e

☐

Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

	Amount
1c	
1d	
1e	
1f	

2a

Did the organization include an amount on Form 990, Part X, line 21?

☐ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

	(a)Current Year	(b)Prior Year	(c)Two Years Back	(d)Three Years Back	(e)Four Years Back
1a Beginning of year balance	341,469	325,924	471,202		
b Contributions					
c Investment earnings or losses	66,302	46,030	-106,576		
d Grants or scholarships	1,806				
e Other expenditures for facilities and programs	28,302	27,728	35,884		
f Administrative expenses	3,488	2,757	2,818		
g End of year balance	374,175	341,469	325,924		

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶

b

Permanent endowment ▶

c

Term endowment ▶ 100.000 %

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations

3a(i)

Yes

No

(ii) related organizations

3a(ii)

No

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

3b

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

Description of investment	(a) Cost or other basis (investment)	(b) Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land		1,022,395		1,022,395
b Buildings		6,120,818	2,812,605	3,308,213
c Leasehold improvements		36,254		36,254
d Equipment		305,237	299,145	6,092
e Other		49,100	49,100	0
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				4,372,954

Schedule D (Form 990) 2010

Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

1	Total revenue (Form 990, Part VIII, column (A), line 12)	1	
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	
4	Net unrealized gains (losses) on investments	4	
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	
9	Total adjustments (net) Add lines 4 - 8	9	
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

1	Total revenue, gains, and other support per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	
b	Donated services and use of facilities	2b	
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part VIII, line 12, but not on line 1		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	
e	Add lines 2a through 2d	2e	
3	Subtract line 2e from line 1	3	
4	Amounts included on Form 990, Part IX, line 25, but not on line 1:		
a	Investment expenses not included on Form 990, Part VIII, line 7b	4a	
b	Other (Describe in Part XIV)	4b	
c	Add lines 4a and 4b	4c	
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

Identifier	Return Reference	Explanation
DESCRIPTION OF INTENDED USE OF ENDOWMENT FUNDS	PART V, LINE 4	ALL ENDOWMENT FUNDS ARE ADMINISTERED IN ACCORDANCE WITH THE DONOR AGREEMENT. RESTRICTED FUNDS ARE USED FOR PROGRAMS TO PROMOTE JEWISH CONTINUITY OR PROVIDE FINANCIAL ASSISTANCE IN OUR COMMUNITY. SCHOLARSHIP FUNDS ARE USED TO AWARD POST-HIGH SCHOOL SCHOLARSHIPS TO STUDENTS IN OUR COMMUNITY MEETING THE REQUIRED CRITERIA. UNRESTRICTED FUND IS USED TO SUPPORT THE SARASOTA-MANATEE JEWISH FEDERATION (FEDERATION) PROGRAMS AS DETERMINED BY THE BOARD OF DIRECTORS. THE PERMANENTLY ENDOWED FUNDS ARE FUNDS HELD IN PERPETUITY WITH THE INCOME USED TO IMPLEMENT THE FEDERATION MISSION.

SCHEDULE F
(Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

► Complete if the organization answered "Yes" to Form 990,
Part IV, line 14b, 15, or 16.
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2010

Open to Public
Inspection

Name of the organization SARASOTA-MANATEE JEWISH FEDERATION INC	Employer identification number 59-1227747
--	--

Part I General Information on Activities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

1 For grantmakers. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? ☐ Yes ☐ No

2 For grantmakers. Describe in Part V the organization's procedures for monitoring the use of grant funds outside the United States

3 Activites per Region (Use Part V if additional space is needed)

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region or independent contractors	(d) Activities conducted in region (by type) (e g , fundraising, program services, investments, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region/investments in region
MIDDLE EAST AND NORTH AFRICA	0	0	PROGRAM SERVICES EXPENSES	FEES AND TRAVEL EXPENSES FOR A TROUPE TO PERFORM IN SARASOTA, FL, TRAVEL EXPENSES FOR TRIPS TO ISRAEL	32,601
3a Sub-total	0	0			32,601
3b Total from continuation sheets to Part I	0	0			0
3c Totals (add lines 3a and 3b)	0	0			32,601

1

(i) Method of valuation (book, FMV, appraisal, other)

3 Enter total number of other organizations or entities

Part III **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 16.
Use Part V if additional space is needed.

[illegible]

Part IV Foreign Forms

- 1

Was the organization a U S transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926 (see instructions for Form 926)*

☐

Yes

☒

No
- 2

Did the organization have an interest in a foreign trust during the tax year? *If " Yes," the organization may be required to file Form 3520 and/or Form 3520-A. (see instructions for Forms 3520 and 3520-A)*

☐

Yes

☒

No
- 3

Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with respect to Certain Foreign Corporations. (see instructions for Form 5471)*

☐

Yes

☒

No
- 4

Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see instructions for Form 8621)*

☐

Yes

☒

No
- 5

Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with respect to Certain Foreign Partnerships. (see instructions for Form 8865)*

☐

Yes

☒

No
- 6

Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to file Form 5713, International Boycott Report (see instructions for Form 5713).*

☐

Yes

☒

No

Additional Data

Software ID:
Software Version:
EIN: 59-1227747
Name: SARASOTA-MANATEE JEWISH FEDERATION INC

Part V **Supplemental Information**
Complete this part to provide the information (see instructions) required in Part I, line 2, and any additional information.

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding
Fundraising or Gaming Activities

OMB No 1545-0047

2010

Open to Public Inspection

Complete if the organization answered "Yes" to Form 990, Part IV, lines 17, 18, or 19,
or if the organization entered more than \$15,000 on Form 990-EZ, line 6a.
▶ Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I Fundraising Activities.

Complete if the organization answered "Yes" to Form 990, Part IV, line 17.

1

Indicate whether the organization raised funds through any of the following activities. Check all that apply.

a

☒

Mail solicitations

e

☒

Solicitation of non-government grants

b

☒

Internet and e-mail solicitations

f

☐

Solicitation of government grants

c

☒

Phone solicitations

g

☒

Special fundraising events

d

☒

In-person solicitations

2a

Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services?

☒ Yes ☐ No

b

If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least \$5,000 by the organization. Form 990-EZ filers are not required to complete this table.

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions?		(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
		Yes	No			
RICHARD BERGMAN 1350 MAIN ST SUITE 902 SARASOTA, FL 34236	DEVELOPMENT CONSULTANT - FUND RAISING AND COMMUNITY OUTREACH		No	1,825,405	119,527	1,705,878
GREEN POINT CALL CENTER SERVICES INC PO BOX 458 RYE, NY 10580	TELEMARKETING CAMPAIGNS		No	113,658	7,542	106,116
Total ▶				1,939,063	127,069	1,811,994

3

List all states in which the organization is registered or licensed to solicit funds or has been notified it is exempt from registration or licensing.

FL

Part II Fundraising Events.

Complete if the organization answered "Yes" to Form 990, Part IV, line 18, or reported more than \$15,000 on Form 990-EZ, line 6a. List events with gross receipts greater than \$5,000.

Revenue			(a) Event #1	(b) Event #2	(c) Other Events	(d) Total Events
			LION OF JUDAH	ISRAEL NIGHT	2	(Add col (a) through
			(event type)	EVENT	(total number)	col (c))
				(event type)		
Direct Expenses	1	Gross receipts	12,950	156,781		169,731
	2	Less Charitable contributions	5,000	121,156		126,156
	3	Gross income (line 1 minus line 2)	7,950	35,625		43,575
	4	Cash prizes				
	5	Non-cash prizes				
	6	Rent/facility costs				
	7	Food and beverages				
	8	Entertainment				
	9	Other direct expenses	19,013	138,879		157,892
	10	Direct expense summary Add lines 4 through 9 in column (d)				157,892
	11	Net income summary Combine lines 3 and 10 in column (d).				-114,317

Part III Gaming.

Complete if the organization answered "Yes" to Form 990, Part IV, line 19, or reported more than \$15,000 on Form 990-EZ, line 6a.

Revenue			(a) Bingo	(b) Pull tabs/Instant bingo/progressive bingo	(c) Other gaming	(d) Total gaming
						(Add col (a) through col (c))
Direct Expenses	1	Gross revenue				
	2	Cash prizes				
	3	Non-cash prizes				
	4	Rent/facility costs				
	5	Other direct expenses				
	6	Volunteer labor	☐ Yes % ☐ No	☐ Yes % ☐ No	☐ Yes % ☐ No	
	7	Direct expense summary Add lines 2 through 5 in column (d)				
	8	Net gaming income summary Combine lines 1 and 7 in column (d)				

9 Enter the state(s) in which the organization operates gaming activities

a Is the organization licensed to operate gaming activities in each of these states? ☐ Yes ☐ No

b If "No," Explain

10a Were any of the organization's gaming licenses revoked, suspended or terminated during the tax year? ☐ Yes ☐ No

b If "Yes," Explain

11

Does the organization operate gaming activities with nonmembers?

☐ Yes ☐ No

12

Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming?

☐ Yes ☐ No

13

Indicate the percentage of gaming activity operated in

a	The organization's facility	13a	
b	An outside facility	13b	

14

Provide the name and address of the person who prepares the organization's gaming/special events books and records

Name

Address

15a

Does the organization have a contract with a third party from whom the organization receives gaming revenue?

☐ Yes ☐ No

b

If "Yes," enter the amount of gaming revenue received by the organization \$ and the amount of gaming revenue retained by the third party \$

c

If "Yes," enter name and address

Name

Address

16 Gaming manager information

Name

Gaming manager compensation \$

Description of services provided

☐ Director/officer

☐ Employee

☐ Independent contractor

17

Mandatory distributions

a

Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license?

☐ Yes ☐ No

b

Enter the amount of distributions required under state law distributed to other exempt organizations or spent in the organization's own exempt activities during the tax year \$

Part IV Complete this part to provide additional information for responses to question on Schedule G (see instructions.)

Identifier	ReturnReference	Explanation
EXPLANATION OF FUNDRAISING PAYMENTS	SCHEDULE G, PART I, LINE 2B, COLUMN (V)	THE AGREEMENT STIPULATES A FIXED AMOUNT FOR FUNDRAISING SERVICES THE CONSULTANT SUBMITS RECEIPTS FOR EXPENSE PAYMENTS THE ORGANIZATION HAS NO EXPENSES ONLY ARRANGEMENT WITH ANY FUNDRAISERS

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Grants and Other Assistance to Organizations,
Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990

OMB No 1545-0047

2010

Open to Public
Inspection

Employer identification number
59-1227747

Part I General Information on Grants and Assistance

1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance?

☒ Yes ☐ No

2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Part II can be duplicated if additional space is needed. ☐

1 (a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
See Additional Data Table							

2

Enter total number of section 501(c)(3) and government organizations

49

3

Enter total number of other organizations

0

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 22.
Use Schedule I-1 (Form 990) if additional space is needed.

(a)Type of grant or assistance	(b)Number of recipients	(c)Amount of cash grant	(d)Amount of non-cash assistance	(e)Method of valuation (book, FMV, appraisal, other)	(f)Description of non-cash assistance
(1) SCHOLARSHIPS	183	124,939			

Part IV

Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

Identifier	Return Reference	Explanation
PROCEDURE FOR MONITORING GRANTS IN THE U S	PART I, LINE 2	SCHEDULE I, PART I, LINE 2 GRANTEES ARE REQUIRED TO SUBMIT WRITTEN FINAL REPORTS UPON COMPLETION OF THE GRANT EXCEPTIONS ARE MADE FOR OPERATING GRANTS FROM DONOR ADVISED FUNDS AND DONOR RECOMMENDED GRANTS

Software ID:

Software Version:

EIN: 59-1227747

Name: SARASOTA-MANATEE JEWISH FEDERATION INC

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
AMERICAN TECHNION SOCIETY7251 W PALMETTO PARK RD 201 BOCA RATON,FL 33433	13-0434195	501(C)(3)	11,000				GENERAL
AMERICAN FRIENDS OF ALYN HOSPITAL51 EAST 42ND STREET SUITE 308 NEW YORK,NY 10017	13-6100833	501(C)(3)	11,836				GENERAL
AMERICAN JEWISH COMMITTEEPO BOX 19078 NEWARK,NJ 07195	13-5563393	501(C)(3)	5,200				GENERAL
CHABAD OF BRADENTON 11509 PALMBRUSH TRL BRADENTON,FL 34202	20-1636179	501(C)(3)	6,600				GENERAL
BBYOPASSPORT TO ISRAEL 2020 5 STREET NW 7TH FLOOR WASHINGTON,DC 20006	31-1794932	501(C)(3)	7,110				GENERAL
CHABAD OF VENICE & NORTHPORT2169 S TAMIAMI TRAIL VENICE,FL 34293	20-2799569	501(C)(3)	28,560				GENERAL
COEXISTENCE INCPO BOX 2559 SARASOTA,FL 342302559	20-3581293	501(C)(3)	5,715				GENERAL
CURE AUTISM NOW5455 WILSHIRE BLVD LOS ANGELES,CA 90036	95-4542637	501(C)(3)	5,000				GENERAL
FRIENDS OF THE ISRAEL DEFENSE FORCES27600 FARMINGTON SUITE 204 FARMINGTON HILLS,MI 48334	13-3156445	501(C)(3)	6,500				GENERAL
HILLEL HOUSE - UNIVERSITY OF MASSACHUSETTS388 N PLEASANT ST 15 AMHERST,MA 01002	04-3110103	501(C)(3)	13,000				GENERAL
JEWISH FED OF LEHIGH VALLEY702 N 22ND ST ALLENTOWN,PA 18104	23-6396949	501(C)(3)	50,000				GENERAL
JEWISH HOUSING COUNCIL1951 N HONORE AVE SARASOTA,FL 34235	65-0091025	501(C)(3)	51,296				GENERAL

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
JEWISH NATIONAL FUND 4625 EAST BAY DRIVE SUITE 308 CLEARWATER,FL 33764	13-1659627	501(C)(3)	88,700				GENERAL
JEWISH FAMILY & CHILDREN'S SERVICE 2688 FRUITVILLE RD SARASOTA,FL 34237	59-2693318	501(C)(3)	15,442				GENERAL
AMERICAN JEWISH JOINT DISTRIBUTION COMMITTEE INC 711 3RD AVE 10TH FLOOR NEW YORK,NY 10017	13-1656634	501(C)(3)	115,611				GENERAL
SARASOTA FILM FESTIVAL 332 COCOANUT AVENUE SARASOTA,FL 34236	65-0826229	501(C)(3)	10,000				GENERAL
SARASOTA OPERA 61 NORTH PINEAPPLE AVE SARASOTA,FL 34234	23-7089047	501(C)(3)	25,000				GENERAL
SARASOTA ORCHESTRA 709 N TAMIAMI TRAIL SARASOTA,FL 34236	59-2603081	501(C)(3)	5,200				GENERAL
TEL AVIV FOUNDATION 220 FIFTH AVENUE SUITE 1301 NEW YORK,NY 10001	13-3145161	501(C)(3)	32,500				GENERAL
TEMPLE BETH SHOLOM 1050 S TUTTLE AVE SARASOTA,FL 34237	23-7156328	501(C)(3)	30,129				GENERAL
TEMPLE EMANU-EL 151 S MCINTOSH RD SARASOTA,FL 34232	59-1145961	501(C)(3)	15,650				GENERAL
THE JEWISH AGENCY FOR ISRAEL 633 3RD AVENUE 21ST FLOOR NEW YORK,NY 10017	23-0053483	501(C)(3)	59,500				GENERAL
THE JEWISH FEDERATION OF NORTH AMERICA 25 BROADWAY SUITE 1700 NEW YORK,NY 100041010	13-1624240	501(C)(3)	211,789				GENERAL
BARRACK HEBREW ACADEMY 272 SOUTH BRYN MAWR AVENUE BRNY MAWR,PA 19010	23-1352614	501(C)(3)	200,000				GENERAL

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
TEMPLE SINAI4631 S LOCKWOOD RIDGE ROAD SARASOTA, FL 34231	59-0356302	501(C)(3)	24,700				GENERAL
HADASSAH WOMENS ZIONIST ORGANIZATION OF AMERICA47 PERIMETER CENTER E 210 ATLANTA, GA 30346	58-6032056	501(C)(3)	7,000				GENERAL
THE IVYMOUNT SCHOOL 11611 SEVEN LOCKS ROAD ROCKVILLE, MD 20854	52-1195527	501(C)(3)	5,000				GENERAL
ORT AMERICA75 MAIDEN LANE 10TH FLOOR NEW YORK, NY 10038	13-5562424	501(C)(3)	30,050				GENERAL
ST STEPHEN EPISCOPAL SCHOOL315 41ST STREET WEST BRADENTON, FL 34209	65-0771320	501(C)(3)	5,000				GENERAL
SOUTH AREA SOLOMON SCHECHTERONE COMMERCE WAY NORWOOD, MA 02062	04-3043595	501(C)(3)	10,000				GENERAL
THE UNIVERSITY OF CENTRAL FLORIDA4000 CENTRAL FLORIDA PARKWAY ORLANDO, FL 32816	59-3086453	501(C)(3)	11,500				GENERAL
THE UNIVERSITY OF FLORIDAPO BOX 114025 GAINESVILLE, FL 32611	59-0974739	501(C)(3)	15,500				GENERAL
THE MINNEAPOLIS JEWISH FEDERATION13100 WAYZATA BLVD MINNETONKA, MN 55305	41-0693866	501(C)(3)	10,000				GENERAL
THE UNIVERSITY OF MARYLAND BALTIMORE500 W BALTIMORE STREET BALTIMORE, MD 21201	52-6002033	501(C)(3)	10,000				GENERAL
THE UNIVERSITY OF MINNESOTA - TWIN CITIES 106 PLEASANT STREET SE MINNEAPOLIS, MN 55455	41-6042488	501(C)(3)	5,000				GENERAL
CHABAD LUBAVITCH OF SARASOTA AND MANATEE 7700 S BENEVA ROAD SARASOTA, FL 34238	65-0234425	501(C)(3)	18,550				GENERAL

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
CHABADS CHILDREN OF CHERNOBYL675 3RD AVE 3210 NEW YORK,NY 10017	13-3722594	501(C)(3)	7,700				GENERAL
ENDOWMENT FOR MIDDLE EAST TRUTH1050 CONNECTICUT AVENUE NW WASHINGTON,DC 20036	20-4329740	501(C)(3)	7,500				GENERAL
FLORIDA STATE UNIVERSITYA1500 UNIVERSITY CENTER TALLAHASSEE,FL 32306	59-6152180	501(C)(3)	5,500				GENERAL
G WIZ THE SCIENCE MUSEUM1001 BLVD OF THE ARTS SARASOTA,FL 34236	65-0268098	501(C)(3)	12,500				GENERAL
GOLDIE FELDMAN ACADEMY1050 S TUTTLE AVE SARASOTA,FL 34237	23-7156328	501(C)(3)	7,500				GENERAL
HONEST REPORTING COM INC10024 SKOKIE BLVD SKOKIE,IL 60077	06-1611859	501(C)(3)	11,000				GENERAL
ISRAEL CHILDREN CENTER 3275 W HILLSBORO BLVD DEERFIELD BEACH,FL 33442	13-2961273	501(C)(3)	70,000				GENERAL
JOHN HOPKINS UNIVERSITY100 N CHARLES STREET SUITE 321 BALTIMORE,MD 21201	52-0595110	501(C)(3)	5,000				GENERAL
LEO BAECK EDUCATION CENTER FOUNDATION 3555 TIMMONS LAND SUITE 1440 HOUSTON,TX 77027	76-0205816	501(C)(3)	10,000				GENERAL
ST JUDE CHILDREN'S RESEARCH HOSPITAL501 ST JUDE PLACE MEMPHIS,TN 38105	62-0646012	501(C)(3)	20,000				GENERAL
VAN WEZEL FOUNDATION INC777 N TAMIAMI TRAIL SARASOTA,FL 34236	59-2807055	501(C)(3)	26,375				GENERAL
YOUTH EXPERIENCING ART INC2751 DONALD ROSS ROAD EAST SARASOTA,FL 34240	27-1727218	501(C)(3)	20,000				GENERAL

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

(a) Name and address of organization or government	(b) EIN	(c) IRC Code section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV , appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
ZIONINST ORGANIZATION OF AMERICA4 EAST 34TH STREET NEW YORK,NY 10016	13-5628475	501(C)(3)	10,000				GENERAL

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2010

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

Name of the organization

SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number

59-1227747

Part I

Questions Regarding Compensation

		Yes	No
1a	Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items		
	☐ First-class or charter travel ☐ Housing allowance or residence for personal use ☐ Travel for companions ☐ Payments for business use of personal residence ☐ Tax idemnification and gross-up payments ☐ Health or social club dues or initiation fees ☐ Discretionary spending account ☐ Personal services (e g , maid, chauffeur, chef)		
b	If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain	1b	
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?	2	
3	Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply		
	☒ Compensation committee ☒ Written employment contract ☐ Independent compensation consultant ☒ Compensation survey or study ☒ Form 990 of other organizations ☒ Approval by the board or compensation committee		
4	During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization		
a	Receive a severance payment or change-of-control payment from the organization or a related organization?	4a	No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	No
c	Participate in, or receive payment from, an equity-based compensation arrangement?	4c	No
	If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III		
	Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.		
5	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of		
a	The organization?	5a	No
b	Any related organization?	5b	No
	If "Yes," to line 5a or 5b, describe in Part III		
6	For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of		
a	The organization?	6a	No
b	Any related organization?	6b	No
	If "Yes," to line 6a or 6b, describe in Part III		
7	For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III	7	No
8	Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III	8	No
9	If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	9	

Part II **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

Note. The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

(A) Name		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation reported in prior Form 990 or Form 990-EZ
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
(1) HOWARD TEVLOWITZ	(i) (ii)	174,454 0	0 0	1,760 0	17,445 0	17,168 0	210,827 0	0 0
(2) MARTY HABERER	(i) (ii)	135,150 0	0 0	4,965 0	13,930 0	14,993 0	169,038 0	0 0
(3)								
(4)								
(5)								
(6)								
(7)								
(8)								
(9)								
(10)								
(11)								
(12)								
(13)								
(14)								
(15)								
(16)								

Part III **Supplemental Information**

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
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SCHEDULE M
(Form 990)

NonCash Contributions

OMB No 1545-0047

2010

Open to Public Inspection

►Complete if the organization answered "Yes" on Form 990, Part IV, lines 29 or 30.
► Attach to Form 990.

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Part I

Types of Property

	(a) Check if applicable	(b) Number of Contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining oncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles .				
7 Boats and planes				
8 Intellectual property . .				
9 Securities—Publicly traded	X	26	297,887	NYSE
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests .				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other . .				
15 Real estate—Residential .				
16 Real estate—Commercial				
17 Real estate—Other . .				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts . .				
23 Scientific specimens . .				
24 Archeological artifacts .				
25 Other ► (_____)				
26 Other ► (_____)				
27 Other ► (_____)				
28 Other ► (_____)				
29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement			29	
30a During the year, did the organization receive by contribution any property reported in Part I, lines 1-28 that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?				Yes No
b If "Yes," describe the arrangement in Part II				
31 Does the organization have a gift acceptance policy that requires the review of any non-standard contributions?				Yes
32a Does the organization hire or use third parties or related organizations to solicit, process, or sell non-cash contributions?				No
b If "Yes," describe in Part II				
33 If the organization did not report revenues in column (c) for a type of property for which column (a) is checked, describe in Part II				

Part II

Supplemental Information. Complete this part to provide the information required by Part I, lines 30b, 32b, and 33. Also complete this part for any additional information.

Identifier	Return Reference	Explanation
METHOD FOR DETERMINING NUMBER OF CONTRIBUTORS	PART I, COLUMN (B)	THE AMOUMT IN COLUMN B IS THE NUMBER OF CONTRIBUTORS

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on
Form 990 or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010

Open to Public
Inspection

Name of the organization
SARASOTA-MANATEE JEWISH FEDERATION INC

Employer identification number
59-1227747

Identifier	Return Reference	Explanation
VOLUNTEERS	FORM 990, PART I, LINE 6	FEDERATION VOLUNTEERS SERVED ON VARIOUS COMMITTEES, BOARDS, ASSISTED WITH SET UP, BREAKDOWN, AND REGISTRATION FOR FEDERATION EVENTS AND PROGRAMS IN ADDITION THE VOLUNTEERS ASSISTED WITH STUFFING ENVELOPES AND VARIOUS MAILINGS

Identifier	Return Reference	Explanation
NUMBER OF W-2'S FILED	FORM 990, PART V, LINE 2A	THE ORGANIZATION USES AN EMPLOYEE LEASING COMPANY AND DOES NOT ACTUALLY FILE A FORM W-3, HOWEVER, IN THE STATE OF FLORIDA, THE ORGANIZATION AND LEASING COMPANY ARE CONSIDERED CO-EMPLOYERS THE NUMBER OF EMPLOYEES LISTED IN PART V IS THE NUMBER OF EMPLOYEES PROVIDING SERVICES TO THE ORGANIZATION BUT THE EMPLOYEES ARE ACTUALLY INCLUDED ON THE W-3 OF THE EMPLOYEE LEASING COMPANY

Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 2		DANIEL MILLER (COMMITTEE CHAIR) AND NELLE MILLER (PRESIDENT) ARE HUSBAND AND WIFE ALAN ADES (COMMITTEE CHAIR) AND RUTH ADES ARE (DIRECTOR) HUSBAND AND WIFE KAREN (COMMITTEE CHAIR) AND TOM BERNSTEIN (DIRECTOR) ARE HUSBAND AND WIFE

Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION A, LINE 4		THE FISCAL YEAR CHANGED FROM 6/1 - 5/31 TO CALENDAR YEAR (1/1 - 12/31) BEGINNING 6/1/2011

Identifier	Return Reference	Explanation
FORM 990, PART VI, SECTION B, LINE 11		SARASOTA-MANATEE JEWISH FEDERATION POSTS THE COMPLETED 990 DRAFT ON-LINE AND SENDS A NOTICE TO THE BOARD MEMBERS WHEN IT IS AVAILABLE FOR THEIR REVIEW THE ACCOUNTING FIRM THAT COMPLETES THE 990 MAKES A PRESENTATION TO THE FULL BOARD ON THE 990 TO BE FILED

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION B, LINE 12C	ALL SARASOTA-MANATEE JEWISH FEDERATION, INC (FEDERATION) BOARD MEMBERS AND STAFF SIGN A CONFLICT OF INTEREST POLICY ANNUALLY ALSO FEDERATION DISTRIBUTED ETHICAL GUIDELINES POLICY TO ITS BOARD

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION B, LINE 15	THE EXECUTIVE DIRECTOR HAS A CONTRACT THAT WAS RE-NEGOTIA TED IN 3/2011 THE ASSISTANT EXECUTIVE DIRECTOR HAS A CONTRACT THAT WAS NEGOTIA TED IN 8/2006 IN EACH CASE THE PERSONNEL COMMITTEE REVIEWED SALARY STRUCTURES FOR SIMILAR POSITIONS WITH UNITED JEWISH COMMUNITIES, AN UMBRELLA ORGANIZATION FOR NORTH AMERICA FEDERATIONS THE FINAL CONTRACT FOR THESE POSITIONS ARE APPROVED BY THE BOARD THESE CONTRACTS ARE MAINTAINED IN PERMANENT PERSONNEL FILE ON PREMISES

Identifier	Return Reference	Explanation
	FORM 990, PART VI, SECTION C, LINE 19	THE ORGANIZATION MAKES ITS GOVERNING DOCUMENTS AND CONFLICT OF INTEREST POLICY AVAILABLE TO THE PUBLIC UPON REQUEST, THE ORGANIZATION MAKES ITS FINANCIAL STATEMENTS AVAILABLE TO PUBLIC ON ITS WEBSITE AND UPON REQUEST

Identifier	Return Reference	Explanation
CHANGES IN NET ASSETS OR FUND BALANCES	FORM 990, PART XI, LINE 5	NET UNREALIZED GAINS ON INVESTMENTS 100,732 CHANGE IN SPLIT INTEREST AGREEMENTS -49,474 CHANGE IN VALUE OF PARTNERSHIP INTEREST IN JCEP 1,358,719 TOTAL TO FORM 990, PART XI, LINE 5 1,409,977