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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)	OMB No 1545-0047 2011 Open to Public Inspection
	▶ The organization may have to use a copy of this return to satisfy state reporting requirements	

A For the 2011 calendar year, or tax year beginning 09-01-2011 and ending 08-31-2012		D Employer identification number 74-1109654	
B Check if applicable ☐ Address change ☐ Name change ☐ Initial return ☐ Terminated ☐ Amended return ☐ Application pending	C Name of organization Jewish Federation of Greater Houston		E Telephone number (713) 729-7000
	Doing Business As		G Gross receipts \$ 16,194,724
	Number and street (or P O box if mail is not delivered to street address) 5603 South Braeswood Blvd	Room/suite	
	City or town, state or country, and ZIP + 4 Houston, TX 77096		
	F Name and address of principal officer Lee Wunsch 5603 South Braeswood Houston, TX 77096		
I Tax-exempt status ☒ 501(c)(3) ☐ 501(c) () ◀(Insert no) ☐ 4947(a)(1) or ☐ 527		H(a) Is this a group return for affiliates? ☐ Yes ☒ No	
J Website: ▶ www.houstonjewish.org		H(b) Are all affiliates included? ☐ Yes ☒ No If "No," attach a list (see instructions)	
K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other ▶		H(c) Group exemption number ▶	
		L Year of formation 1940	M State of legal domicile TX

Part I	Summary
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Activities & Governance	1 Briefly describe the organization's mission or most significant activities Jewish Federation takes a leadership approach to overseeing programs and services that invigorate and promote the Jewish community by collaborating with worthy organizations, evaluating needs, raising funds, investing in initiatives, and communicating with the public		
	2 Check this box ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets		
	3 Number of voting members of the governing body (Part VI, line 1a)	3	48
	4 Number of independent voting members of the governing body (Part VI, line 1b)	4	48
	5 Total number of individuals employed in calendar year 2011 (Part V, line 2a)	5	39
	6 Total number of volunteers (estimate if necessary)	6	300
7a Total unrelated business revenue from Part VIII, column (C), line 12	7a	0	
7b Net unrelated business taxable income from Form 990-T, line 34	7b		
Revenue	8 Contributions and grants (Part VIII, line 1h)	Prior Year	Current Year
	9 Program service revenue (Part VIII, line 2g)	20,381,288	16,006,041
	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)	186,094	178,516
	11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	15,651	10,167
	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)		0
		20,583,033	16,194,724
Expenses	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	14,730,395	10,946,325
	14 Benefits paid to or for members (Part IX, column (A), line 4)		0
	15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	2,283,455	2,330,879
	16a Professional fundraising fees (Part IX, column (A), line 11e)		0
	b Total fundraising expenses (Part IX, column (D), line 25) ☒ 1,199,530		
	17 Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	1,569,962	1,112,215
	18 Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	18,583,812	14,389,419
	19 Revenue less expenses Subtract line 18 from line 12	1,999,221	1,805,305
Net Assets or Fund Balances		Beginning of Current Year	End of Year
	20 Total assets (Part X, line 16)	9,551,606	9,496,718
	21 Total liabilities (Part X, line 26)	5,119,960	3,250,967
	22 Net assets or fund balances Subtract line 21 from line 20	4,431,646	6,245,751

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			2013-07-15 Date	
	Mary Ward-Hecksel Sr VP / CFO Type or print name and title				
Paid Preparer's Use Only	Preparer's signature	Jody Blazek	Date	Check if self-employed ☒	Preparer's taxpayer identification number (see instructions)
	Firm's name (or yours if self-employed), address, and ZIP + 4	Blazek & Vetterling 2900 Wesleyan Suite 200 Houston, TX 770275132			EIN
					Phone no (713) 439-5739

May the IRS discuss this return with the preparer shown above? (see instructions) ☒ Yes ☐ No

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

The Jewish Federation of Greater Houston (JFGH) leads and mobilizes the Jewish community by supporting the most impactful organizations, programs and individuals who embrace Jewish living through participation and philanthropy

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 organization's program service accomplishments for each of its three largest program services, as measured 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 \$ 10,953,619 including grants of \$ 10,946,325) (Revenue \$ 50,613)

The most significant ways the Jewish Federation of Greater Houston makes a difference in Jewish lives is through our annual community-wide fundraising effort, the Federation Annual Campaign Money raised through the Campaign benefits millions of Jewish people in need - here in Houston, across the United States, in Israel, in Argentina, in the Former Soviet Union, in Ethiopia, and in nearly 60 other countries around the world by granting funds to organizations to accomplish the following Feeding the hungry Educating the young Caring for the old Comforting the sick Counseling the troubled Rescuing the oppressed Calming the frightened Providing a voice for those unable to speak for themselves Offering vital assistance to those unable to meet their own basic needs

4b

(Code) (Expenses \$ 637,314 including grants of \$) (Revenue \$ 14,659)

Bureau of Jewish Education (BJE) nurtures the continuity and quality of Jewish life in the Greater Houston area by fostering and strengthening life-long Jewish learning The BJE is dedicated to Enhancing the quality of formal and informal Jewish education in the community, promoting enrollment and participation in Jewish education at all levels, advocating on behalf of students, parents, institutions and professionals involved in Jewish education, encouraging and providing for the professional growth of educators, and serving as a facilitator for cooperation and collaboration among schools and community organizations

4c

(Code) (Expenses \$ 277,146 including grants of \$) (Revenue \$ 89,864)

Community Relations Committee (CRC) programs focus on education and information on domestic and international issues directly impacting the Jewish community

4d

Other program services (Describe in Schedule O)

(Expenses \$ 211,077 including grants of \$) (Revenue \$ 23,380)

4e

Total program service expenses

\$ 12,079,156

Form 990 (2011)

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)? If "Yes," complete Schedule A.	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I.		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? If "Yes," complete Schedule C, Part II.	Yes	
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? If "Yes," complete Schedule C, Part III.		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I.		No
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II.		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III.		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? If "Yes," complete Schedule D, Part IV.		No
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V.	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? If "Yes," complete Schedule D, Part VI.	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? If "Yes," complete Schedule D, Part VII.		No
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? If "Yes," complete Schedule D, Part VIII.		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? If "Yes," complete Schedule D, Part IX.		No
e	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.		No
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)? If "Yes," complete Schedule D, Part X.		No
12a	Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII.		No
b	Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional.	Yes	
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?		No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Part I.	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? If "Yes," complete Schedule F, Part II and IV.		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? If "Yes," complete Schedule F, Part III and IV.		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? If "Yes," complete Schedule G, Part I.		No
18	Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II.		No
19	Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III.		No
20a	Did the organization operate one or more hospitals? If "Yes," complete Schedule H.		No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? Note. All Form 990 filers that operated one or more hospitals must attach audited financial statements.		

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 questions 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		No
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		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		No
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 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		No
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	Yes	
35a	Is any related organization a controlled entity of the filing organization within the meaning of section 512(b)(13)?	35a	Yes	
b	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>	35b	Yes	
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. .	1a	42
b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.	1b	0
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, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return.	2a	39
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	2b	Yes
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?	3a	No
b	If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.	3b	No
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 or securities 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	No
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	No
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	Yes
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?	7b	Yes
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	0
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	No
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?	7h	No
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	No
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. All 501(c)(29) organizations must list in Schedule O each state in which they are licensed to issue qualified health plans, the amount of reserves required by each state, and the amount of reserves the organization allocated to each state.	13a	No
b	Enter the aggregate 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 aggregate 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	No

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		
1a	48		
b	Enter the number of voting members included in line 1a, above, who are independent	1b	48
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	Did the organization have members or stockholders?	6	No
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	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	Did the organization have local chapters, branches, or affiliates?	10a	No
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	No
11a	Has the organization provided a complete 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 the Form 990		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes
b	Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes
13	Did the organization have a written whistleblower policy?	13	Yes
14	Did 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," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b	No

Section C. Disclosure

17	List the States with which a copy of this Form 990 is required to be filed
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 made 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 made 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. Mary Ward-Hecksel 5603 South Braeswood Houston, TX 77096 (713) 729-7000

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 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 organizations compensated any current or former officer, director, or trustee

[illegible]

Part VII

1b	Sub-Total			
c	Total from continuation sheets to Part VII, Section A			
d	Total (add lines 1b and 1c)	648,800		69,337

2 Total number of individuals (including but not limited to those I
\$100,000 of reportable compensation from the organization) 4

		Yes	No
3	Did the organization list any former officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i>	3	No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i>	4	Yes
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i>	5	No

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. Report compensation for the calendar year ending with or within the organization's tax year.

(A) Name and business address	(B) Description of services	(C) Compensation
IKON Ricoh USA 820 Gears Rd Houston, TX 77067	Staff/copier leasing	107,553

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of 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					
	d	Related organizations	1d	1,887,179				
	e	Government grants (contributions)	1e					
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	14,118,862				
	g	Noncash contributions included in lines 1a-1f \$ 524						
	h	Total. Add lines 1a-1f		16,006,041				
Program Service Revenue			Business Code					
	2a	Program ticket sales	900099	169,080	169,080			
	b	Campaign events/other	900099	9,436	9,436			
	c							
	d							
	e							
	f	All other program service revenue						
	g	Total. Add lines 2a-2f		178,516				
Other Revenue	3	Investment income (including dividends, interest and other similar amounts)		10,167			10,167	
	4	Income from investment of tax-exempt bond proceeds		0				
	5	Royalties		0				
	6a	Gross rents	(i) Real	(ii) Personal				
		b	Less rental expenses					
		c	Rental income or (loss)					
		d	Net rental income or (loss)		0			
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other				
		b	Less cost or other basis and sales expenses					
		c	Gain or (loss)					
		d	Net gain or (loss)		0			
	8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18	a					
	b	Less direct expenses	b					
	c	Net income or (loss) from fundraising events		0				
	9a	Gross income from gaming activities See Part IV, line 19	a					
	b	Less direct expenses	b					
	c	Net income or (loss) from gaming activities		0				
	10a	Gross sales of inventory, less returns and allowances	a					
	b	Less cost of goods sold	b					
	c	Net income or (loss) from sales of inventory		0				
	Miscellaneous Revenue		Business Code					
	11a							
b								
c								
d	All other revenue							
e	Total. Add lines 11a-11d		0					
12	Total revenue. See Instructions		16,194,724	178,516			10,167	

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

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 United States See Part IV, line 21	10,899,225	10,899,225		
2	Grants and other assistance to individuals in the United States See Part IV, line 22	47,100	47,100		
3	Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16	0			
4	Benefits paid to or for members	0			
5	Compensation of current officers, directors, trustees, and key employees	601,301	87,135	242,581	271,585
6	Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	0			
7	Other salaries and wages	1,169,611	482,133	413,098	274,380
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	72,148	33,270	10,883	27,995
9	Other employee benefits	154,303	43,094	81,625	29,584
10	Payroll taxes	333,516	128,980	48,803	155,733
11	Fees for services (non-employees)				
a	Management	0			
b	Legal	540		540	
c	Accounting	24,507		24,507	
d	Lobbying	0			
e	Professional fundraising See Part IV, line 17	0			
f	Investment management fees	0			
g	Other	85,169	18,264	35,300	31,605
12	Advertising and promotion	97,454	3,852	70,973	22,629
13	Office expenses	88,228	18,195	48,879	21,154
14	Information technology	46,830	5,884	22,510	18,436
15	Royalties	0			
16	Occupancy	68,466	15,063	29,954	23,449
17	Travel	17,833	2,851	12,287	2,695
18	Payments of travel or entertainment expenses for any federal, state, or local public officials	0			
19	Conferences, conventions, and meetings	64,426	9,499	33,394	21,533
20	Interest	0			
21	Payments to affiliates	0			
22	Depreciation, depletion, and amortization	10,255		10,255	
23	Insurance	24,314	4,928	11,020	8,366
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	Other expenses	22,148	4,314	10,317	7,517
b	Program expenses	275,369	275,369		
c	Campaign programs	286,676		3,807	282,869
d					
e					
f	All other expenses	0			
25	Total functional expenses. Add lines 1 through 24f	14,389,419	12,079,156	1,110,733	1,199,530
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			492	1	1,305
	2	Savings and temporary cash investments			2,086,559	2	2,598,860
	3	Pledges and grants receivable, net			7,139,208	3	6,593,408
	4	Accounts receivable, net			78,133	4	38,680
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L				5	0
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L				6	0
	7	Notes and loans receivable, net				7	0
	8	Inventories for sale or use				8	0
	9	Prepaid expenses and deferred charges			40,965	9	48,424
	10a	Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D.	10a	1,247,857			
	b	Less: accumulated depreciation	10b	1,087,339	130,749	10c	160,518
	11	Investments—publicly traded securities				11	0
	12	Investments—other securities. See Part IV, line 11			75,500	12	50,500
	13	Investments—program-related. See Part IV, line 11				13	0
	14	Intangible assets				14	0
	15	Other assets. See Part IV, line 11				15	5,023
16	Total assets. Add lines 1 through 15 (must equal line 34)			9,551,606	16	9,496,718	
Liabilities	17	Accounts payable and accrued expenses			174,946	17	204,420
	18	Grants payable			4,932,977	18	3,039,510
	19	Deferred revenue			12,037	19	7,037
	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 (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D				25	
	26	Total liabilities. Add lines 17 through 25			5,119,960	26	3,250,967
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			3,010,857	27	4,905,248
	28	Temporarily restricted net assets			1,420,789	28	1,340,503
	29	Permanently restricted net assets				29	
	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			4,431,646	33	6,245,751
34	Total liabilities and net assets/fund balances			9,551,606	34	9,496,718	

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	16,194,724
2	Total expenses (must equal Part IX, column (A), line 25)	2	14,389,419
3	Revenue less expenses Subtract line 2 from line 1	3	1,805,305
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	4,431,646
5	Other changes in net assets or fund balances (explain in Schedule O)	5	8,800
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	6,245,751

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?	Yes	
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	Yes	
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		No

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

2011

Open to Public
Inspection

Name of the organization Jewish Federation of Greater Houston	Employer identification number 74-1109654
--	--

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)

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A church, convention of churches, or association of churches section 170(b)(1)(A)(i).

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

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

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

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)

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

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)

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

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)

An organization organized and operated exclusively to test for public safety Seesection 509(a)(4).

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

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)

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

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?

Provide the following information about the supported organization(s)

(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 IRC 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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	15,305,040	20,941,347	19,116,677	20,381,288	16,006,041	91,750,393
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
3 The value of services or facilities furnished by a governmental unit to the organization without charge						0
4 Total. Add lines 1 through 3	15,305,040	20,941,347	19,116,677	20,381,288	16,006,041	91,750,393
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)						2,077,681
6 Public Support. Subtract line 5 from line 4						89,672,712

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
7 Amounts from line 4	15,305,040	20,941,347	19,116,677	20,381,288	16,006,041	91,750,393
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	71,771	11,265	19,095	15,651	10,167	127,949
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0
10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets						0
11 Total support (Add lines 7 through 10)						91,878,342

12

Gross receipts from related activities, etc (See instructions)

12

1,056,710

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 2011 (line 6 column (f) divided by line 11 column (f))	14	97 600 %
15	Public Support Percentage for 2010 Schedule A, Part II, line 14	15	80 910 %

16a

33 1/3% support test—2011. 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—2010. 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—2011. 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—2010. 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 IIIPart III

Support Schedule for Organizations Described in IRC 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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(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 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage		
15 Public Support Percentage for 2011 (line 8 column (f) divided by line 13 column (f))	15	
16 Public support percentage from 2010 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2011 (line 10c column (f) divided by line 13 column (f))	17	
18 Investment income percentage from 2010 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2011. 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—2010. 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 explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Explanation

SCHEDULE C
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ Complete if the organization is described below.

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

OMB No 1545-0047

2011

Open to Public Inspection

If the organization answered “Yes,” to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered “Yes,” to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered “Yes,” to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, line 35c (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

Name of the organization Jewish Federation of Greater Houston	Employer identification number 74-1109654
--	--

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

1	Provide a description of the organization's direct and indirect political campaign activities on behalf of or in opposition to candidates for public office in Part IV	
2	Political expenditures	▶ \$
3	Volunteer hours	

Part I-B Complete if the organization is exempt under section 501(c)(3).

1	Enter the amount of any excise tax incurred by the organization under section 4955	▶ \$
2	Enter the amount of any excise tax incurred by organization managers under section 4955	▶ \$
3	If the organization incurred a section 4955 tax, did it file Form 4720 for this year?	☐ Yes ☒ No
4a	Was a correction made?	☐ Yes ☒ No
b	If "Yes," describe in Part IV	

Part I-C Complete if the organization is exempt under section 501(c) except section 501(c)(3).

1	Enter the amount directly expended by the filing organization for section 527 exempt function activities	▶ \$
2	Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt funtion activities	▶ \$
3	Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b	▶ \$
4	Did the filing organization file Form 1120-POL for this year?	☐ Yes ☐ No
5	Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization's funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV	

(a) Name	(b) Address	(c) EIN	(d) Amount paid from filing organization's funds If none, enter -0-	(e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0-

Part II-A

Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

- A

Check

☐

if the filing organization belongs to an affiliated group (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)
- B

Check

☐

if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing Organization's Totals	(b) Affiliated Group Totals												
1a Total lobbying expenditures to influence public opinion (grass roots lobbying)															
b Total lobbying expenditures to influence a legislative body (direct lobbying)															
c Total lobbying expenditures (add lines 1a and 1b)															
d Other exempt purpose expenditures															
e Total exempt purpose expenditures (add lines 1c and 1d)															
f Lobbying nontaxable amount Enter the amount from the following table in both columns															
<table><tr><td>If the amount on line 1e, column (a) or (b) is:</td><td>The lobbying nontaxable amount is:</td></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></table>		If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:	Not over \$500,000	20% of the amount on line 1e	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000		
If the amount on line 1e, column (a) or (b) is:	The lobbying nontaxable amount is:														
Not over \$500,000	20% of the amount on line 1e														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
g Grassroots nontaxable amount (enter 25% of line 1f)															
h Subtract line 1g from line 1a If zero or less, enter -0-															
i Subtract line 1f from line 1c If zero or less, enter -0-															
j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?		☐ Yes ☐ No													

4-Year Averaging Period Under Section 501(h)
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

Lobbying Expenditures During 4-Year Averaging Period					
Calendar year (or fiscal year beginning in)	(a) 2008	(b) 2009	(c) 2010	(d) 2011	(e) Total
2a Lobbying non-taxable amount					
b Lobbying ceiling amount (150% of line 2a, column(e))					
c Total lobbying expenditures					
d Grassroots non-taxable amount					
e Grassroots ceiling amount (150% of line 2d, column (e))					
f Grassroots lobbying expenditures					

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

		(a)		(b)	
		Yes	No	Amount	
1	During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of				
a	Volunteers?	Yes			
b	Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?	Yes			
c	Media advertisements?		No		
d	Mailings to members, legislators, or the public?	Yes			175
e	Publications, or published or broadcast statements?	Yes			
f	Grants to other organizations for lobbying purposes?		No		
g	Direct contact with legislators, their staffs, government officials, or a legislative body?	Yes			63,760
h	Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?	Yes			
i	Other activities? If "Yes," describe in Part IV	Yes			14,088
j	Total lines 1c through 1i			78,023	
2a	Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?		No		
b	If "Yes," enter the amount of any tax incurred under section 4912				
c	If "Yes," enter the amount of any tax incurred by organization managers under section 4912				
d	If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?		No		

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

		Yes	No
1	Were substantially all (90% or more) dues received nondeductible by members?	1	
2	Did the organization make only in-house lobbying expenditures of \$2,000 or less?	2	
3	Did the organization agree to carryover lobbying and political expenditures from the prior year?	3	

Part III-B

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes".

1	Dues, assessments and similar amounts from members	1	
2	Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).	2a	
a	Current year		
b	Carryover from last year		
c	Total		
3	Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues	3	
4	If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year?	4	
5	Taxable amount of lobbying and political expenditures (see instructions)	5	

Part IV

Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i.
Also, complete this part for any additional information.

Identifier	Return Reference	Explanation
Part II-B, Line 1i	Part II-B, Line 1i - Other Activities Description	The Jewish Federation's Community Relations Committee initiated and participated in advocacy efforts on issues directly impacting the Jewish community and its constituents on the local, state, and national levels. The efforts included discussions with city, state, and national elected officials on issues involving health and human services, international affairs, and community concerns.

SCHEDULE D
(Form 990)

Department of the Treasury
Internal Revenue Service

Supplemental Financial Statements

OMB No 1545-0047

2011

Open to Public Inspection

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b

Attach to Form 990. See separate instructions.

Name of the organization
Jewish Federation of Greater Houston

Employer identification number
74-1109654

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	
2	Aggregate contributions to (during year)	
3	Aggregate grants from (during year)	
4	Aggregate value at end of year	
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

\$

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	89,072,982	81,674,559	77,490,544		
b Contributions	14,686,040	15,141,907	14,114,975		
c Investment earnings or losses	5,070,105	5,832,826	3,270,220		
d Grants or scholarships	12,102,927	13,576,310	13,201,180		
e Other expenditures for facilities and programs					
f Administrative expenses	806,055				
g End of year balance	95,920,145	89,072,982	81,674,559		

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶ 97 790 %

b

Permanent endowment ▶ 1 950 %

c

Term endowment ▶ 0 260 %

3a

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

(i)

unrelated organizations

(ii)

related organizations

3a(i)

Yes

No

3a(ii)

Yes

b

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

3b

Yes

4

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

Part VI

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

Description of property	(a) Cost or other basis (investment)	(b)Cost or other basis (other)	(c) Accumulated depreciation	(d) Book value
1a Land	29,560			29,560
b Buildings		911,213	784,547	126,666
c Leasehold improvements				
d Equipment		194,404	190,112	4,292
e Other		112,680	112,680	
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				160,518

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
Part V, Line 4	Part V, Line 4 Intended uses of the endowment fund	To support the mission of the Jewish Federation of Greater Houston to preserve and enrich Jewish Communal life through innovative and visionary leadership that is responsive and responsible to Jewish communities locally, nationally, in Israel, and around the world

1

2 Enter total number of recipient organizations listed above that are recognized as charities by the foreign country, recognized as tax-exempt by the IRS, or for which the grantee or counsel has provided a section 501(c)(3) equivalency letter ► _____

3 Enter total number of other organizations or entities ► _____

Part III

[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: 11000144
Software Version: 2011v1.5
EIN: 74-1109654
Name: Jewish Federation of Greater Houston

Part V

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

Schedule I
(Form 990)

Department of the Treasury
Internal Revenue Service

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

2011

Open to Public
Inspection

Name of the organization
Jewish Federation of Greater Houston

Employer identification number
74-1109654

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. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ▶ ☐

(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 listed in the line 1 table ▶

65

3

Enter total number of other organizations listed in the line 1 table ▶

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) Teen Israel Trip Scholarships	21	21,300			
(2) Camp Scholarships	50	25,800			

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
Grantmaker's Description of How Grants are Used		The Federation supports organizations that Provide vital assistance such as food, shelter and medical care, Educate the youth of our community, Provide senior care services & programming, Facilitate leadership development and youth engagement programming, Reconnect Jews with the Jewish community, Offer Jewish programming for young families and children, Develop Israel advocacy skills, support Israel travel for youth, Aid people with special needsThere is no additional monitoring once grants have been awarded
Additional Supplemental Information		The Jewish Federation of Greater Houston is reporting grants to the Jewish Federations of North America (JFNA) which is a 501(c)(3) domestic U S charity In addition, JFNA , and its beneficiary agencies, United Israel Appeal (UIA), a subsidiary of JFNA , and the American Jewish Joint Distribution Committee (JDC) - both 501(c)(3) organizations - each file a separate Form 990 and detailed Schedule F

Software ID: 11000144
Software Version: 2011v1.5
EIN: 74-1109654
Name: Jewish Federation of Greater Houston

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
World ORT Inc 1745 Broadway 17th Floor New York, NY 10019	06-1669917	501(c)(3)	101,350	0			Technology Equip & Training
World ORT Inc 1745 Broadway 17th Floor New York, NY 10019	06-1669917	501(c)(3)	100,000	0			Pre-Aliyah Vocational Training

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
Womens Intl Zionist Organization950 Third Ave Ste 2803 New York, NY 10022	13-3041381	501(c)(3)	100,000	0			Youth Village for at risk kids
United Soup Kitchens Inc700 Broadway Ste 718 New York, NY 10003	20-0042618	501(c)(3)	75,000	0			Food Boxes for Needy

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
Torah Day School of Houston10900 Fondren Houston, TX 77096	23-7278350	501(c)(3)	41,850	0			Operating Funds
Tikva Corporation475 10th Ave 9th Floor New York, NY 10018	22-3779212	501(c)(3)	32,600	0			Children's Home

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
The Shlenker School5600 North Braeswood Blvd Houston, TX 77096	76-0686559	501(c)(3)	97,650	0			Operating Funds
The Shalem Foundation845 Third Ave 6th Floor New York, NY 10022	13-3941865	501(c)(3)	100,000	0			Liberal Arts College in Israel

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
The Koby Mandell Foundation Inc366 Pearsall Ave Ste 1 Cedarhurst, NY 11516	91-2169027	501(c)(3)	50,000	0			Camp-Chldr-Terror/Trgdy
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	7,762	0			JAFI Lone Soldiers

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	52,500	0			Yad Vashem
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	50,000	0			Ethiopian National Project

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	38,000	0			Birthright Israel
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	317,712	0			Annual Support

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	250,100	0			Barzilai Med Ctr
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	250,000	0			Western Galilee Hospital

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	250,000	0			JAFI-Kiryat YA Cntr
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	250,000	0			JAFI-Ben YYV

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	25,000	0			JAFI- Ayalim
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	15,000	0			JAFI- MASA

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	100,000	0			YitzchakShavit Shaar HaNegev H S
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	100,000	0			Israel Cord Blood Bank

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
The Jewish Federations of NA 25 Broadway Suite 1700 New York, NY 10004	13-1624240	501(c)(3)	10,000	0			JAFI-Youth Empowerment
The Elie Wiesel Fndn for Humanity 555 Madison Avenue 20th Floor New York, NY 10022	13-3398151	501(c)(3)	200,000	0			Education of Ethiopian students

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
Seven Acres Jewish Sr Care Svcs6200 N Braeswood Blvd Houston, TX 77074	74-1143086	501(c)(3)	465,122	0			Operating Funds
Seven Acres Jewish Sr Care Svcs6200 N Braeswood Blvd Houston, TX 77074	74-1143086	501(c)(3)	21,000	0			Unrestricted

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
Seven Acres Jewish Sr Care Sv 6200 N Braeswood Blvd Houston, TX 77074	74-1143086	501(c)(3)	6,500	0			Equipmnt & Therapy Svcs
Save a Childs Heart Foundation 10050 Chapel Road Suite 18 Potomac, MD 20854	52-1783323	501(c)(3)	200,000	0			Pediatric Cardiac Hospital

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

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Robert M Beren Academy11333 Cliffwood Dr Houston, TX 77035	74-1652136	501(c)(3)	111,850	0			Operating Funds/Travel Schol
PEF Israel Endowmnt Funds Inc317 Madison Ave New York, NY 10017	13-6104086	501(c)(3)	150,000	0			Avukat Or

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
Ohr Torah Stone Insts of Israel49 W 45th St Suite 701 New York, NY 10036	13-3275531	501(c)(3)	250,000	0			General Support
New Israel Fund 2100 M Street NW Ste 619 Washington, DC 20037	94-2607722	501(c)(3)	10,000	0			Unrestricted

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

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Nefesh BNefesh Jewish Souls50 Eisenhower Dr Paramus, NJ 07652	22-3804152	501(c)(3)	100,000	0			N A Immigration & Absorption
National Council of Young Israel111 John St Rm 600 New York, NY 10038	13-3617102	501(c)(3)	125,000	0			Int'l Young Israel Movement

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

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Mickey Leland Kibbutzim Internship Found 1400 Post Oak Blvd Suite 500 Houston, TX 77056	74-2119190	501(c)(3)	60,000	0			Israeli Prog for Houston Teens
Leo Baeck Ed Center Foundation 3555 Timmons Ste 1440 Houston, TX 77027	76-0205816	501(c)(3)	15,000	0			Ethiopian Matriculation

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
Leo Baeck Ed Center Foundation 3555 Timmons Ste 1440 Houston, TX 77027	76-0205816	501(c)(3)	102,500	0			New school-low-income kids
Keren Anshei Chayil Fund 305 W 260th St Bronx, NY 10471	26-1908110	501(c)(3)	50,000	0			Support for orthodox soliers

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
Just One Life Inc 587 5TH Ave Ste 702 New York, NY 10017	13-3533863	501(c)(3)	100,000	0			Counseling Pregnant Women
Jewish Union Foundation11 Broadway New York, NY 10004	13-3636595	501(c)(3)	75,000	0			Center for disenfranchised youth

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 Telegraphic Agency24 W 30th St Floor 4 New York, NY 10001	13-0887610	501(c)(3)	7,800	0			General Support
Jewish National Fund42 East 69th Street New York, NY 10021	13-1659627	501(c)(3)	150,000	0			OR Movement

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 Federation of Gr Dallas7800 North Haven Road Dallas,TX 75230	75-0800654	501(c)(3)	32,500	0			Hillel Consortium
Jewish Family Service4131 S Braeswood Houston,TX 77025	74-1152607	501(c)(3)	400,000	0			Employmnt & Transport

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 Family Service4131 S Braeswood Houston, TX 77025	74-1152607	501(c)(3)	245,000	0			Operating Funds
Jewish Community Ctr Assoc520 Eighth Ave 4th Floor New York, NY 10018	13-5599486	501(c)(3)	20,500	0			Operating Funds

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 Childrens RegionalP O Box 7368 Metari, LA 70010	72-0408936	501(c)(3)	10,000	0			Operating Funds
Israel Independence Fund200 Central Park S Apt 31A New York, NY 10019	20-8676286	501(c)(3)	100,000	0			Jewish Awareness Prog

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
Israel Help Organization11271 Alumni Way Jacksonville, FL 32246	20-3979417	501(c)(3)	50,000	0			New Children's Playground
Israel Guide Dog Ctr-Blind968 Easton Rd Ste H Warrington, PA 18976	23-2519029	501(c)(3)	50,000	0			Training of Two Guide Dogs

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
Interfaith Ministries for Gr Hous3217 Montrose Blvd Houston, TX 77006	74-1488102	501(c)(3)	6,000	0			Operating Funds
Houston Symphony Society615 Louisiana Ste 102 Houston, TX 77002	74-1157373	501(c)(3)	25,000	0			Israel at 65 Celebration

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
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	8,794	0			Special Projects
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	220,000	0			Young Adult Programming

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
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	163,825	0			Chaplaincy
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	14,000	0			Shabbat Limmud

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
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	13,000	0			Hebrew Union College Schlrsmps
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	101,803	0			Children's Book Club

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
Houston Jewish Community Fndn 5603 South Braeswood Houston, TX 77096	76-0187329	501(c)(3)	100,378	0			Yom Limmud-Day of Education
Holocaust Museum Houston 5401 Caroline Street Houston, TX 77004	76-0331398	501(c)(3)	20,000	0			Unrestricted

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
Gush Etzion FoundationP O Box 1030 Manchester, NH 03105	31-1558409	501(c)(3)	125,000	0			Child Care Ctr Construc
Greene Family Camp1192 Smith Lane Bruceville, TX 76630	13-1663143	501(c)(3)	15,000	0			Camp Counselor Incentives

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
Friends of the Isr Defense Forces 1430 Broadway Rm 1301 New York, NY 10028	13-3156445	501(c)(3)	900,000	0			Nefesh B'Nefesh
Friends of the Isr Defense Fo1430 Broadway Rm 1301 New York, NY 10028	13-3156445	501(c)(3)	55,000	0			Families of Fallen Soldiers

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
Emery Weiner Cntr for Jewish Ed9825 Stella Link Houston, TX 77025	74-1990541	501(c)(3)	202,500	0			Operating Funds
ER Jewish Community Center 5601 S Braeswood Blvd Houston, TX 77096	74-1198298	501(c)(3)	702,411	0			Operating Funds

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

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ER Jewish Community Center 5601 S Braeswood Blvd Houston, TX 77096	74-1198298	501(c)(3)	50,550	0			Maccabi Games & Artsfest
ER Jewish Community Center 5601 S Braeswood Blvd Houston, TX 77096	74-1198298	501(c)(3)	35,265	0			Meals on Wheels

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

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ER Jewish Community Center 5601 S Braeswood Blvd Houston, TX 77096	74-1198298	501(c)(3)	143,500	0			Mishpacha & Me Program
Cong Beth Shalom-Woodlands 5125 Shadow Bend Pl The Woodlands, TX 77381	76-0030790	501(c)(3)	35,000	0			Gesher Program

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

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Christian Friends of Israeli CommP O Box 50833 Colorado Springs, CO 80949	41-2020104	501(c)(3)	50,000	0			Gush Katif-Refugee needs
Christian Friends of IsraeliP O Box 50833 Colorado Spring, CO 80949	41-2020104	501(c)(3)	50,000	0			Heart of Benjamin

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

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Central Fund of Israel980 Ave of the Americas 3rd Fl New York, NY 10018	13-2992985	501(c)(3)	100,000	0			Israel Law Center
Care for Israel-Afikim1428 36th Street Ste 200 Brooklyn, NY 11218	26-2576920	501(c)(3)	100,000	0			Afikim Family Enrichment Assoc

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

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Camp Young Judaea9647 Hillcroft Houston, TX 77096	74- 6063430	501(c)(3)	15,000	0			Camp Counselor Incentives
Birthright Israel Foundation33 East 33rd St 7th Floor New York, NY 10016	13- 4092050	501(c)(3)	158,755	0			Yng Adult Trvl- Israel

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

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Bikur Vizrat Cholim Inc1221 42nd St Brooklyn, NY 11219	20-1572620	501(c)(3)	150,000	0			Hm Spc Needs Children
Beth Yeshurun Day School4525 Beechnut Houston, TX 77096	80-0165161	501(c)(3)	90,450	0			Operating Funds

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

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American Friends of NATAL Inc1120 Ave of the Americas 4th Fl New York, NY 10036	20-1914370	501(c)(3)	10,000	0			Israel Trauma Center
American Friends of Migdal Ohr1560 Broadway Suite 807 New York, NY 10036	13-3389558	501(c)(3)	100,000	0			Support for at-risk children

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

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American Friends of Meir Panim5316 New Utrecht Ave Brooklyn, NY 11219	20-1582478	501(c)(3)	75,500	0			Meals for disadvantaged kids
Am Jewish Jnt Distribution Comm 711 Third Ave 10th Floor New York, NY 10017	13-1656634	501(c)(3)	272,463	0			Support for Holocaust Survivors

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
Am Jewish Jnt Distribution Comm 711 Third Ave 10th Floor New York, NY 10017	13-1656634	501(c)(3)	18,000	0			Spinal Surgery-Ethiopia
Am Jewish Jnt Distribution Comm 711 Third Ave 10th Floor New York, NY 10017	13-1656634	501(c)(3)	14,500	0			Ethiopian Women's Schlrshps

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

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Am Jewish Jnt Distribution Comm 711 Third Ave 10th Floor New York, NY 10017	13-1656634	501(c)(3)	111,900	0			Humanitarian Aid-Ethiopia
Am Frnds of Sdei Chemed Child39 Broadway No 25 Floor New Yrok, NY 10006	52-1176413	501(c)(3)	100,000	0			Therapy for at-risk children

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
Am Frnds of Bnei Akiva Yeshivot in Israe11 Broadway Ste 901 New York, NY 10004	52-6080692	501(c)(3)	150,000	0			Construction of student dorms
Am Friends of New Comm in Isr169-10 73rd Avenue Flushing, NY 11366	31-1740763	501(c)(3)	50,000	0			New location for Hadadı

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

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Am Friends of Netanya College 270 Madison Avenue 9th Floor New York, NY 10016	13-3937453	501(c)(3)	250,000	0			Student Dormitories
Am Friends of Isr Emerg Aid FundPO Box 456 Sharon, MA 02067	26-4515751	501(c)(3)	50,000	0			Firefighter Training

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
Am Friends of Herzog Hosp136 East 57th Street New York, NY 10022	13-5655183	501(c)(3)	250,000	0			Children's Chronic Resp Dept
Am Friends of Hamaayan Fdn119 E 24th St Brooklyn, NY 11210	11-3431269	501(c)(3)	100,000	0			CommCntr for victims of terror

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

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Am Assoc Ben Gurion Univ the Negev Inc1430 Broadway 8th Floor New York, NY 10018	23-7270753	501(c)(3)	100,000	0			International student dormitory
All 4 Israel Inc53 Dewhurst St Staten Island, NY 10314	05-0553417	501(c)(3)	50,000	0			Ethiopian Schlrs Pgrm

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2011

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

Jewish Federation of Greater Houston

Employer identification number

74-1109654

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	Yes
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	Yes
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?	4a	No
b	Participate in, or receive payment from, a supplemental nonqualified retirement plan?	4b	Yes
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	No

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) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, columns (D) and (E) for that individual.

[illegible]

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
Sch J, Part I, Line 1a	Part I, Line 1a. Relevant information in regards to selections on 1a.	The Federation pays \$41 per month for telephone/internet service used for business purposes at the home of Lee Wunsch, President & CEO. These payments are not treated as taxable compensation because they are deemed to be expenses relating to his services provided to the Federation.

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

2011

Open to Public
Inspection

Name of the organization Jewish Federation of Greater Houston	Employer identification number 74-1109654
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Identifier	Return Reference	Explanation
Form 990, Part VI, Line 19	Form 990, Part VI, Line 19 Other Organization Documents Publicly Available	Upon request
Form 990, Part VI, Line 15b	Form 990, Part VI, Line 15b Compensation Review and Approval Process for Officers and Key Employees	The Personnel Sub-Committee of the Board consisting of the Chairman of Board, Chairman of the Budget and Finance Committee and the Chairman of the Personnel Committee is responsible for determining the compensation of the organization's officers and key employees. Officer's compensation is determined after a review of comparable data of non-profit sister agencies of similar size.
Form 990, Part VI, Line 12c	Form 990, Part VI, Line 12c Explanation of Monitoring and Enforcement of Conflicts	A Conflict of Interest Statement is distributed to Board members every year and several follow ups are made. If there are conflicts of interest, they are addressed with the President and CEO and the Chair of the Board. If appropriate, after discussion, the conflict is brought before the Board.
Form 990, Part VI, Line 11	Form 990, Part VI, Line 11 Form 990 Review Process	The Form is reviewed by the CFO and made available to Board members on the Federation's website, prior to filing.
Form 990, Part VI, Line 4	Form 990, Part VI, Line 4 Description of Significant Changes to Organizational Documents	Article III, Section A, Part 5 was revised to add "c" Rabbinic Member. It was decided that the Board makeup should include a designated Rabbinic position. Article V, Section B, Part 8 was revised to change "Overseas Committee" to "Israel and Overseas Committee" to be more representative of who the Committee is and for Israel to have added importance. Article III, Section A, Part 5, was revised to add a designated rabbinic position to the Board.
Form 990, Part VI, Line 2	Form 990, Part VI, Line 2 Description of Business or Family Relationship of Officers, Directors, Et	David Hess and John Hess have a family relationship. Elyse Kalmans, Benjamin Warren, and Naomi Warren have a family relationship. Elyse Kalmans and Arturo Karakowsky have a business relationship. Benjamin Warren, Naomi Warren and Arturo Karakowsky have a business relationship. Jacob Leon and Lee Wunsch have a business relationship. Nat Levy and Michael Levy have a family relationship. Nat Levy and Denis Braham have a business relationship. Nat Levy and Sandra Finkelman have a business relationship. Nat Levy and David Hess have a business relationship. Nat Levy and John Hess have a business relationship. Nat Levy and Jacob Leon have a business relationship. Nat Levy and Haya Varon have a business relationship. Nat Levy and Mary Ward-Hecksel have a business relationship. Nat Levy and Lee Wunsch have a business relationship. Steven Morgen and Lee Wunsch have a business relationship. Ben Rosenberg and Rabbi Joseph Radinsky have a business relationship. Daniel Trachtenberg and Ellen Trachtenberg have a family relationship. Sanford Weiner and Fran Friedman have a family relationship. Sanford Weiner and Debra Cohen have a family relationship.
Form 990, Part III, Line 4d	Form 990, Part III, Line 4d Other Program Services Description	OTHER PROGRAM SERVICES 4. Community Relations Committee (CRC) programs focus on education and information on domestic and international issues directly impacting the Jewish community.

SCHEDULE R
(Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

OMB No 1545-0047

2011

Open to Public Inspection

Name of the organization
Jewish Federation of Greater Houston

Employer identification number
74-1109654

Part I Identification of Disregarded Entities (Complete if the organization answered "Yes" on Form 990, Part IV, line 33.)					
(a) Name, address, and EIN of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II Identification of Related Tax-Exempt Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.)							
(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled organization	
						Yes	No
(1) Donald & Martha Kaplan Freedman Fd 5603 S Braeswood Blvd Houston, TX 77096 45-5449056	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Houston Jewish Community Foundation	Yes	
(2) The Samuels Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0207517	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
(3) The Rauch Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0300344	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
(4) Alan F & Diane R Levin Fd 5603 South Braeswood Blvd Houston, TX 77096 76-0613294	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
(5) The Becker Family Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0560995	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
(6) Mary L & William J Osher Fd 5603 South Braeswood Blvd Houston, TX 77096 20-5094518	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
(7) Houston Jewish Community Fdn 5603 South Braeswood Blvd Houston, TX 77096 76-0187329	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(1)	Jewish Federation of Greater Houston	Yes	

Part III

Identification of Related Organizations Taxable as a Partnership (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income (related, unrelated, excluded from tax under sections 512- 514)	(f) Share of total income	(g) Share of end-of- year assets	(h) Disproportionate allocations?		(i) Code V—UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV

Identification of Related Organizations Taxable as a Corporation or Trust (Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.)

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership
(1) Extremis Corporation 5603 S Braeswood Blvd Houston, TX 77096 76-0492189	Dormant	TX	Hou Jew Comm Fd	C corp			
(2) Minnette & Jerome Robinson CRAT 5603 S Braeswood Blvd Houston, TX 77096 76-6103916	Remainder Trust	TX	Hou Jew Comm Fd	Trust			

Part V

Transactions With Related Organizations (Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35, 35A, or 36.)

Note. Complete line 1 if any entity is listed in Parts II, III or IV

1

During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?

a

Receipt of (i) interest (ii) annuities (iii) royalties (iv) rent from a controlled entity

b

Gift, grant, or capital contribution to related organization(s)

c

Gift, grant, or capital contribution from related organization(s)

d

Loans or loan guarantees to or for related organization(s)

e

Loans or loan guarantees by related organization(s)

f

Sale of assets to related organization(s)

g

Purchase of assets from related organization(s)

h

Exchange of assets with related organization(s)

i

Lease of facilities, equipment, or other assets to related organization(s)

j

Lease of facilities, equipment, or other assets from related organization(s)

k

Performance of services or membership or fundraising solicitations for related organization(s)

l

Performance of services or membership or fundraising solicitations by related organization(s)

m

Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)

n

Sharing of paid employees with related organization(s)

o

Reimbursement paid to related organization(s) for expenses

p

Reimbursement paid by related organization(s) for expenses

q

Other transfer of cash or property to related organization(s)

r

Other transfer of cash or property from related organization(s)

Yes

No

1a

No

1b

Yes

1c

Yes

1d

No

1e

No

1f

No

1g

No

1h

No

1i

No

1j

No

1k

No

1l

No

1m

Yes

1n

Yes

1o

No

1p

Yes

1q

No

1r

No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of other organization	(b) Transaction type(a-r)	(c) Amount involved	(d) Method of determining amount involved
(1) The Samuels Foundation	c	117,500	cash
(2) Alan F & Diane R Levin Fd	c	10,100	cash
(3) The Becker Family Foundation	c	25,000	cash
(4) Mary L & William J Osher Fd	c	231,350	cash
(5) Houston Jewish Community Fdn	c	1,503,229	cash
(6) Houston Jewish Community Fdn	b	621,800	cash

Schedule R (Form 990) 2011

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization. See instructions regarding exclusion for certain investment partnerships.

[illegible]

Part VII

Supplemental Information

Complete this part to provide additional information for responses to questions on Schedule R (see instructions)

Identifier	Return Reference	Explanation	
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Software ID: 11000144
Software Version: 2011v1.5
EIN: 74-1109654
Name: Jewish Federation of Greater Houston

Form 990, Schedule R, Part II - Identification of Related Tax-Exempt Organizations

(a) Name, address, and EIN of related organization	(b) Primary Activity	(c) Legal Domicile (State or Foreign Country)	(d) Exempt Code section	(e) Public charity status (if 501(c)(3))	(f) Direct Controlling Entity	(g) Section 512 (b)(13) controlled organization	
Donald & Martha Kaplan Freedman Fd 5603 S Braeswood Blvd Houston, TX 77096 45-5449056	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Houston Jewish Community Foundation	Yes	
The Samuels Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0207517	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
The Rauch Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0300344	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
Alan F & Diane R Levin Fd 5603 South Braeswood Blvd Houston, TX 77096 76-0613294	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
The Becker Family Foundation 5603 South Braeswood Blvd Houston, TX 77096 76-0560995	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
Mary L & William J Osher Fd 5603 South Braeswood Blvd Houston, TX 77096 20-5094518	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(3) I	Jewish Federation of Greater Houston	Yes	
Houston Jewish Community Fdn 5603 South Braeswood Blvd Houston, TX 77096 76-0187329	Support the Jewish Federation of Gr Hou	TX	501(c)(3)	509(a)(1)	Jewish Federation of Greater Houston	Yes	

Form 990, Schedule R, Part V - Transactions With Related Organizations

(a) Name of other organization	(b) Transaction type(a-r)	(c) Amount Involved (\$)	(d) Method of determining amount involved
(1) The Samuels Foundation	c	117,500	cash
(2) Alan F & Diane R Levin Fd	c	10,100	cash
(3) The Becker Family Foundation	c	25,000	cash
(4) Mary L & William J Osher Fd	c	231,350	cash
(5) Houston Jewish Community Fdn	c	1,503,229	cash
(6) Houston Jewish Community Fdn	b	621,800	cash

Additional Data

Software ID: 11000144

Software Version: 2011v1.5

EIN: 74-1109654

Name: Jewish Federation of Greater Houston

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			
Shira Yoshor Trustee	1 00	X						0	0	0
Dolores Wilkenfeld Trustee	1 00	X						0	0	0
Sandy Weiner Trustee	1 00	X						0	0	0
Naomi Warren Trustee	1 00	X						0	0	0
Benjamin Warren Trustee	1 00	X						0	0	0
Haya Varon Trustee	1 00	X						0	0	0
Ellen Trachtenberg Trustee	1 00	X						0	0	0
Daniel Trachtenberg Trustee	1 00	X						0	0	0
Rick Stein Trustee	1 00	X						0	0	0
Rob Shoss Trustee	1 00	X						0	0	0
Ben Rosenberg Trustee	1 00	X						0	0	0
Vicky P Richker Trustee	1 00	X						0	0	0
Rabbi Joseph Radinsky Trustee	1 00	X						0	0	0
Paula Pozmantier Trustee	1 00	X						0	0	0
Rabbi Steven Morgen Trustee	1 00	X						0	0	0
Mindy Mitzner Trustee	1 00	X						0	0	0
Gil Melman Trustee	1 00	X						0	0	0
Nat Levy Trustee	1 00	X						0	0	0
Mike Levy Trustee	1 00	X						0	0	0
Marshall Levit Trustee	1 00	X						0	0	0
Fred Levine Trustee	1 00	X						0	0	0
Bryan Leibman MD Trustee	1 00	X						0	0	0
Bobby Lapin Trustee	1 00	X						0	0	0
Arturo Karakowsky Trustee	1 00	X						0	0	0
Joe Kaplan Trustee	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			
Elyse Spector Kalmans Trustee	1 00	X						0	0	0
John Hess Trustee	1 00	X						0	0	0
David Hess Trustee	1 00	X						0	0	0
Franklin J Jay Harberg Jr Trustee	1 00	X						0	0	0
John Goott Trustee	1 00	X						0	0	0
Brian Goldstein Trustee	1 00	X						0	0	0
Raquel Goldberg Trustee	1 00	X						0	0	0
Frances Friedman Trustee	1 00	X						0	0	0
Sandra Finkelman Trustee	1 00	X						0	0	0
Marla Feldman Trustee	1 00	X						0	0	0
Daniel Fein Trustee	1 00	X						0	0	0
Vikki Evans Trustee	1 00	X						0	0	0
Debra G Cohen Trustee	1 00	X						0	0	0
Nada Chandler Trustee	1 00	X						0	0	0
Denis Braham Trustee	1 00	X						0	0	0
Burton Bluestone Trustee	1 00	X						0	0	0
Linda Freedman Block Trustee	1 00	X						0	0	0
David Barish PhD Trustee	1 00	X						0	0	0
Jacob Leon Sec/Treasurer	1 00	X		X				0	0	0
Gerald Merfish Vice Chair	1 00	X		X				0	0	0
Carol Goldberg Vice Chair	1 00	X		X				0	0	0
Stephen Breslauer Vice Chair	1 00	X		X				0	0	0
Leonard Goldstein Chairman	10 00	X		X				0	0	0
Suzanne Jacobson Sr VP Develop	39 00			X				133,300	0	9,665
Mary Ward-Hecksel Sr VP/CFO	39 00			X				134,845	0	8,665

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			
Lee Wunsch President & CEO	39 00			X				257,490	0	41,342
Elaine Kellerman VP of Comm Ptnshp	39 00					X		123,165	0	9,665