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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 private foundations)

▶ Do not enter social security numbers on this form as it may be made public

▶ **Go to *www.irs.gov/Form990* for instructions and the latest information.**

OMB No 1545-0047

2018

Open to Public Inspection

A For the 2019 calendar year, or tax year beginning 01-01-2018 , and ending 12-31-2018

B Check if applicable
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
The Jewish Federation of
Sarasota-Manatee Inc

Doing business as

Number and street (or P O box if mail is not delivered to street address) 580 S McIntosh Road | Room/suite

City or town, state or province, country, and ZIP or foreign postal code
Sarasota, FL 34232

D Employer identification number
59-1227747

E Telephone number
(941) 371-4546

G Gross receipts $ 12,384,744

F Name and address of principal officer
HOWARD TEVLOWITZ
580 S McIntosh Road
Sarasota, FL 34232

H(a) Is this a group return for subordinates? ☐ Yes ☑ No
H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)
H(c) Group exemption number ▶

I Tax-exempt status ☑ 501(c)(3) ☐ 501(c) ( ) ◀ (insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ www JFEDSRQ org

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation 1970 | **M** State of legal domicile FL

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
TO STRENGTHEN JEWISH LIFE AND IDENTITY IN OUR COMMUNITY, PROVIDE FOR JEWISH PEOPLE IN NEED AND PROMOTE SUPPORT FOR ISRAEL

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	39
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	39
5	Total number of individuals employed in calendar year 2018 (Part V, line 2a)	5	31
6	Total number of volunteers (estimate if necessary)	6	245
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	210,115
b	Net unrelated business taxable income from Form 990-T, line 34	7b	0

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)	5,357,629	9,661,585
	9	Program service revenue (Part VIII, line 2g)	331,709	290,772
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	650,811	1,950,543
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	263,204	83,323
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	6,603,353	11,986,223
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	2,939,339	2,195,836
	14	Benefits paid to or for members (Part IX, column (A), line 4)	0	0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	1,808,339	1,994,730
	16a	Professional fundraising fees (Part IX, column (A), line 11e)	128,232	155,326
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶875,827		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	1,794,006	1,767,735
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	6,669,916	6,113,627
	19	Revenue less expenses Subtract line 18 from line 12	-66,563	5,872,596
Net Assets or Fund Balances			Beginning of Current Year	End of Year
	20	Total assets (Part X, line 16)	27,038,474	30,409,769
	21	Total liabilities (Part X, line 26)	1,647,517	1,332,076
	22	Net assets or fund balances Subtract line 21 from line 20	25,390,957	29,077,693

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

****** | 2019-11-04
Signature of officer | Date

HOWARD TEVLOWITZ EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN P00585910
Firm's name ▶ Kerkering Barberio & Co			Firm's EIN ▶ 59-1753337	
Firm's address ▶ PO Box 49348 Sarasota, FL 342306348			Phone no (941) 365-4617	

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

Part III **Statement of Program Service Accomplishments**

Check if Schedule O contains a response or note to any line in this Part III . . . . ☑

1 Briefly describe the organization's mission

TO STRENGTHEN JEWISH LIFE AND IDENTITY IN OUR COMMUNITY, PROVIDE FOR JEWISH PEOPLE IN NEED AND PROMOTE SUPPORT FOR ISRAEL

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 are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a (Code) (Expenses $ 1,631,297 including grants of $ 765,987) (Revenue $ 178,331)

See Additional Data

4b (Code) (Expenses $ 1,122,403 including grants of $ 527,032) (Revenue $ 105,657)

See Additional Data

4c (Code) (Expenses $ 725,651 including grants of $ 340,734) (Revenue $ 1,384)

See Additional Data

(Code) (Expenses $ 1,197,049 including grants of $ 562,083) (Revenue $ 5,400)

Collaborative Partnerships The Federation works with a wide range of community partners to support Jewish-themed programming for the entire community Examples of specific programs funded include * Embracing Our Differences The Federation partners with Coexistence, Inc and pays a portion of an EOD education staff position, each year to present this international outdoor art exhibit The exhibit promotes the value of diversity, the benefit of inclusion and the significance of the active rejection of hatred and prejudice Public school children, grades K-12, are transported to the exhibit for free each year - since 2004, close to 2 5 million students have benefitted from this free educational program * The Federation partnered with Perlman Music Program/Suncoast and Van Wezel Performing Arts Hall to present In the Fiddler's House - A Night of Klezmer, a live performance of klezmer music featuring Itzhak Perlman and the world-renowned Klezmer Conservatory Band Klezmer is a musical tradition of the Ashkenazi Jews of Eastern Europe The event impacted close to 1,700 community members from all backgrounds and all ages, offering them an opportunity to appreciate a genre of music that is generally associated with the Jewish community

4d Other program services (Describe in Schedule O)

(Expenses $ 1,197,049 including grants of $ 562,083) (Revenue $ 5,400)

4e **Total program service expenses ▶** 4,676,400

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*	1	Yes	
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2	Yes	
3	Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? *If "Yes," complete Schedule C, Part I*	3		No
4	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		No
5	Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? *If "Yes," complete Schedule C, Part III*	5		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*	6	Yes	
7	Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? *If "Yes," complete Schedule D, Part II*	7		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? *If "Yes," complete Schedule D, Part III*	8		No
9	Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, 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*	9		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*	10	Yes	
11	If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable			
a	Did the organization report an amount for land, buildings, and equipment in Part X, line 10? *If "Yes," complete Schedule D, Part VI*	11a	Yes	
b	Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VII*	11b	Yes	
c	Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part VIII*	11c		No
d	Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? *If "Yes," complete Schedule D, Part IX*	11d		No
e	Did the organization report an amount for other liabilities in Part X, line 25? *If "Yes," complete Schedule D, Part X*	11e	Yes	
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f	Yes	
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a	Yes	
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 and XII is optional*	12b		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? *If "Yes," complete Schedule E*	13		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?	14a		No
b	Did the organization have aggregate revenues or expenses of more than $10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at $100,000 or more? *If "Yes," complete Schedule F, Parts I and IV*	14b	Yes	
15	Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or other assistance to or for any foreign organization? *If "Yes," complete Schedule F, Parts II and IV*	15		No
16	Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or other assistance to or for foreign individuals? *If "Yes," complete Schedule F, Parts III and IV*	16		No
17	Did the organization report a total of more than $15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? *If "Yes," complete Schedule G, Part I*(see instructions)	17	Yes	
18	Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? *If "Yes," complete Schedule G, Part II*	18	Yes	
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*	19		No
20a	Did the organization operate one or more hospital facilities? *If "Yes," complete Schedule H*	20a		No
b	If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b		
21	Did the organization report more than $5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? *If "Yes," complete Schedule I, Parts I and II*	21	Yes	
22	Did the organization report more than $5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? *If "Yes," complete Schedule I, Parts I and III*	22	Yes	

Part IV **Checklist of Required Schedules** *(continued)*

			Yes	No
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? *If "Yes," complete Schedule J*	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? *If "Yes," answer lines 24b through 24d and complete Schedule K If "No," go to line 25a*	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?	24b		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part 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? *If "Yes," complete Schedule L, Part I*	25b		No
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? *If "Yes," complete Schedule L, Part II*	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? *If "Yes," complete Schedule L, Part III*	27	Yes	
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? *If "Yes," complete Schedule L, Part IV*	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? *If "Yes," complete Schedule L, Part IV*	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? *If "Yes," complete Schedule L, Part IV*	28c		No
29	Did the organization receive more than $25,000 in non-cash contributions? *If "Yes," complete Schedule M*	29	Yes	
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? *If "Yes," complete Schedule M*	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? *If "Yes," complete Schedule N, Part I*	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? *If "Yes," complete Schedule N, Part II*	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? *If "Yes," complete Schedule R, Part I*	33		No
34	Was the organization related to any tax-exempt or taxable entity? *If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1*	34		No
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		No
b	If 'Yes' to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? *If "Yes," complete Schedule R, Part V, line 2*	35b		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	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? *If "Yes," complete Schedule R, Part VI*	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b 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 or note to any line in this Part V ☐

					Yes	No
1a	Enter the number reported in Box 3 of Form 1096 Enter -0- if not applicable	1a	60			
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, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a**	31			
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**	Yes	
b	If "Yes," has it filed a Form 990-T for this year? *If "No" to line 3b, provide an explanation in Schedule O*			**3b**	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?			**4a**		No
b	If "Yes," enter the name of the foreign country ▶ See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR)					
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?			**5a**		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions?			**6a**		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			**7a**	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**				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**		No
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			**7f**		No
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			**8**		No
9a	Did the sponsoring organization make any taxable distributions under section 4966?			**9a**		No
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?			**9b**		No
10	**Section 501(c)(7) organizations.** Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12	**10a**				
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**				
11	**Section 501(c)(12) organizations.** Enter					
a	Gross income from members or shareholders	**11a**				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	**11b**				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	**12b**				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state? **Note.** See the instructions for additional information the organization must report on Schedule O			**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**				
c	Enter the amount of reserves on hand	**13c**				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**		No
b	If "Yes," has it filed a Form 720 to report these payments? *If "No," provide an explanation in Schedule O*			**14b**		
15	Is the organization subject to the section 4960 tax on payment(s) of more than $1,000,000 in remuneration or excess parachute payment(s) during the year? If "Yes," see instructions and file Form 4720, Schedule N			**15**		No
16	Is the organization an educational institution subject to the section 4968 excise tax on net investment income? If "Yes," complete Form 4720, Schedule O			**16**		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 or note to any line 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** 39			
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O			
b	Enter the number of voting members included in line 1a, above, who are independent — **1b** 39			
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?	**2**	Yes	
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?	**3**		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	**4**	Yes	
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	**5**		No
6	Did the organization have members or stockholders?	**6**	Yes	
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**	Yes	
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**		
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 this 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**		

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed▶ FL

18 Section 6104 requires an organization to make its Form 1023 (or 1024-A 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 ☐ Other (explain in Schedule O)

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 during the tax year

20 State the name, address, and telephone number of the person who possesses the organization's books and records

▶INNA SIDEMAN 580 S MCINTOSH ROAD SARASOTA, FL 34232 (941) 371-4546

Part VII **Compensation of Officers, Directors,Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

Check if Schedule O contains a response or note to any line in this Part VII . . . . ☐

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

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

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

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

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

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(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			
See Additional Data Table										

Part VII **Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees** *(continued)*

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
See Additional Data Table										

	(D)	(E)	(F)
1b Sub-Total ▶			
c Total from continuation sheets to Part VII, **Section A** ▶			
d Total (add lines 1b and 1c) ▶	423,102	0	110,870

2 Total number of individuals (including but not limited to those listed above) who received more than $100,000 of reportable compensation from the organization ▶ 2

			Yes	No
3	Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	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? *If "Yes," complete Schedule J for such individual*	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? *If "Yes," complete Schedule J for such person*	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
STARLING GROUP 5969 CATTLERIDGE BLVD 200 SARASOTA, FL 34232	GENERAL CONTRACTOR FOR CAPITAL PROJECT	1,700,669
RICHARD BERGMAN, 1255 N GULFSTREAM AVENUE SARASOTA, FL 34236	FUNDRAISING AND OUTREACH CONSULTANT	150,886

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 ▶ 2

Part VIII Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII . . . . ☐

Contributions, Gifts, Grants and Other Similar Amounts

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
1a Federated campaigns . .	1a					
b Membership dues . .	1b					
c Fundraising events . .	1c	16,600				
d Related organizations	1d					
e Government grants (contributions)	1e					
f All other contributions, gifts, grants, and similar amounts not included above	1f	9,644,985				
g Noncash contributions included in lines 1a - 1f $ 1,511,840						
h **Total.** Add lines 1a-1f . . . . ▶			9,661,585			

Program Service Revenue

	Business Code	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
2a ISRAEL MISSION	900099	100,420	100,420		
b LEADERSHIP MISSION	900099	60,420	60,420		
c JEWISH FILM FESTIVAL	900099	43,600	43,600		
d WOMEN'S DAY	900099	32,130	32,130		
e ISRAEL @ 70	900009	19,768	19,768		
f All other program service revenue		34,434	34,434		
g **Total.** Add lines 2a–2f . . . . ▶		290,772			

Other Revenue

	(i)	(ii)	(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512 - 514
3 Investment income (including dividends, interest, and other similar amounts) . . . . . . ▶			63,358			63,358
4 Income from investment of tax-exempt bond proceeds ▶						
5 Royalties . . . . ▶						
	(i) Real	(ii) Personal				
6a Gross rents	207,500					
b Less rental expenses	302,160					
c Rental income or (loss)	-94,660					
d Net rental income or (loss) . . . . ▶			-94,660			-94,660
	(i) Securities	(ii) Other				
7a Gross amount from sales of assets other than inventory	1,896,687	8,682				
b Less cost or other basis and sales expenses	0	18,184				
c Gain or (loss)	1,896,687	-9,502				
d Net gain or (loss) . . . . . ▶			1,887,185			1,887,185
8a Gross income from fundraising events (not including $ 16,600 of contributions reported on line 1c) See Part IV, line 18 . . . . . a		45,550				
b Less direct expenses . . . b		78,177				
c Net income or (loss) from fundraising events . . ▶			-32,627			-32,627
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 . . ▶						
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 . . ▶						
Miscellaneous Revenue		Business Code				
11a Advertising		541800	210,115		210,115	
b Other Support Revenue		900099	495			495
c						
d All other revenue						
e **Total.** Add lines 11a–11d . . . . ▶			210,610			
12 **Total revenue.** See Instructions . . . . . . ▶			11,986,223	290,772	210,115	1,823,751

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)

Check if Schedule O contains a response or note to any line 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) Fundraisingexpenses
1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21	1,982,523	1,982,523		
2 Grants and other assistance to domestic individuals See Part IV, line 22	213,313	213,313		
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, line 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	361,955	209,692	72,391	79,872
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	1,256,369	743,443	232,286	280,640
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)	95,417	50,748	19,084	25,585
9 Other employee benefits	163,078	88,909	32,615	41,554
10 Payroll taxes	117,911	66,031	23,582	28,298
11 Fees for services (non-employees)				
a Management				
b Legal	7,860	4,402	1,572	1,886
c Accounting	40,025	22,414	8,005	9,606
d Lobbying				
e Professional fundraising services See Part IV, line 17	155,326			155,326
f Investment management fees	79,722		79,722	
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	259,468	193,184	14,108	52,176
12 Advertising and promotion	131,788	120,525	767	10,496
13 Office expenses	120,979	83,126	7,224	30,629
14 Information technology	90,082	47,007	15,276	27,799
15 Royalties . .				
16 Occupancy	42,334	23,706	8,467	10,161
17 Travel	338,637	335,810	1,026	1,801
18 Payments of travel or entertainment expenses for any federal, state, or local public officials .				
19 Conferences, conventions, and meetings	37,568	29,968	2,998	4,602
20 Interest				
21 Payments to affiliates				
22 Depreciation, depletion, and amortization . .	66,730	37,369	13,346	16,015
23 Insurance . . .	55,015	21,077	7,052	26,886
24 Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O)				
a FOOD & BEVERAGE	145,664	107,487	4,314	33,863
b NEWSPAPER PRODUCTION	126,222	107,371	1,113	17,738
c RENTAL EXPENSE	105,093	103,896	3	1,194
d DUES & SUBSCRIPTIONS	35,109	27,416	3,497	4,196
e All other expenses	85,439	56,983	12,952	15,504
25 **Total functional expenses.** Add lines 1 through 24e	6,113,627	4,676,400	561,400	875,827
26 **Joint costs.** Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here ▶ ☐ if following SOP 98-2 (ASC 958-720)				

Part X **Balance Sheet**

Check if Schedule O contains a response or note to any line in this Part IX . . . ☐

				(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing		500	1	500
	2	Savings and temporary cash investments		2,590,133	2	3,737,720
	3	Pledges and grants receivable, net		301,961	3	1,791,245
	4	Accounts receivable, net			4	
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L			5	
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L			6	
	7	Notes and loans receivable, net			7	
	8	Inventories for sale or use			8	
	9	Prepaid expenses and deferred charges		48,587	9	59,380
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a 9,559,040			
	b	Less accumulated depreciation	10b 4,443,778	3,717,499	10c	5,115,262
	11	Investments—publicly traded securities		515,940	11	468,058
	12	Investments—other securities See Part IV, line 11		19,181,494	12	18,633,045
	13	Investments—program-related See Part IV, line 11			13	
	14	Intangible assets			14	
	15	Other assets See Part IV, line 11		682,360	15	604,559
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)		27,038,474	16	30,409,769
Liabilities	17	Accounts payable and accrued expenses		611,474	17	460,075
	18	Grants payable		134,074	18	126,117
	19	Deferred revenue			19	
	20	Tax-exempt bond liabilities			20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D			21	
	22	Loans and other 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		901,969	25	745,884
	26	**Total liabilities.** Add lines 17 through 25		1,647,517	26	1,332,076
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ ☑ and complete lines 27 through 29, and lines 33 and 34.**				
	27	Unrestricted net assets		15,273,480	27	15,279,737
	28	Temporarily restricted net assets		2,982,310	28	6,921,148
	29	Permanently restricted net assets		7,135,167	29	6,876,808
		Organizations that do not follow SFAS 117 (ASC 958), 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		25,390,957	33	29,077,693
	34	Total liabilities and net assets/fund balances		27,038,474	34	30,409,769

Part XI Reconcilliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI . . . . . ☑

1	Total revenue (must equal Part VIII, column (A), line 12)	1	11,986,223
2	Total expenses (must equal Part IX, column (A), line 25)	2	6,113,627
3	Revenue less expenses Subtract line 2 from line 1	3	5,872,596
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	25,390,957
5	Net unrealized gains (losses) on investments	5	-2,174,821
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	-11,039
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	29,077,693

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line 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?	2a		No
	If 'Yes,' check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b	Yes	
	If 'Yes,' check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both ☑ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	If "Yes," to line 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?	2c	Yes	
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O			
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?	3a		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	3b		

Additional Data

Software ID:

Software Version:

EIN: 59-1227747

Name: The Jewish Federation of Sarasota-Manatee Inc

Form 990 (2018)

Form 990, Part III, Line 4a:

Israel, Overseas, Advocacy and Community Relations The Jewish Federation of Sarasota-Manatee (JFSM) works to address human and educational needs in Israel, the former Soviet Union, Poland and over 70 countries around the world Examples of specific programs funded include * The Heller Community Relations Committee (CRC), formerly the Heller Israel Advocacy Initiative, was established to build relationships within the Jewish and non-Jewish communities to advance common interests through education and advocacy The CRC works with our partners to advocate for peace and security in Israel, increases community awareness of issues affecting the American Jewish community and Israel, raises consciousness of, and actively confronts anti-Semitism on a global level, and, directly addresses anti-Israel activities in Sarasota-Manatee Under the auspices of the CRC, Gulf Coast Hillel works on the college campuses of New College of Florida, USF Sarasota-Manatee and Ringling College of Art + Design to address issues of anti-Semitism and anti-Israel rhetoric The Boycott, Divestment, Sanctions (BDS) movement is quickly growing on college campuses under the guise that it is a peaceful solution to the conflict between Israel and the Palestinians Through meetings with college administrators, educational programming and holiday celebrations for students, Gulf Coast Hillel provides a positive and active presence on our local campuses and helps to create future Jewish leaders ** Federation staff and volunteers build personal relationships with clergy, civic, and community leadership ** This initiative has sponsored numerous speakers and programs and five interfaith missions to Israel * The Women's Giving Circle is made up of women in the Sarasota-Manatee area who are dedicated to funding projects designed to improve the lives of women and children in Israel Members make a contribution and have a voice in determining the allocation of funds Having just completed its sixth year, the Circle has grown to 84 members who in 2018 awarded 8 organizations a total of $40,788 As an example two of the recipients were American Friends of Leket Israel to support their program to feed at-risk youth in Israel, and Orr Shalom, which provides essential clothing and equipment packs for at-risk orphans * Each year, the Federation selects local high school students to participate in the prestigious Bob Malkin Young Ambassadors Teen Leadership Program (BMYA) This educational and spiritual journey allows teens to develop leadership skills, explore who they are as individuals and as a team, and learn first-hand the importance of Israel to Jews around the world In addition to the highly subsidized trip, the program includes regular pre- and post- mission meetings, social events, and leadership training, during which the students will develop their relationships with one another and with Israel, and become ambassadors in our community In 2018, twelve students participated in the Bob Malkin Young Ambassadors Teen Leadership Program More than 190 high school students have participated in this program since its onset * Overseas Grants **ZAKA Search and Rescue to provide K-9 leadership and training program for at-risk youth in Kiryat Malachi, a city in Israel's southern periphery, situated near the Gaza border, where children and youth suffer from higher rates of PTSD ** American Friends of Leket Israel This grant provided a truck to make food pickups and deliveries throughout the country, and also supports a program that delivers hot meals to vulnerable seniors living in government hostels ** Yad Ezra V'Shulamit is a humanitarian organization that helps needy families in Israel overcome poverty The grant provides support for their Feed a Baby project, which delivers baby formula, baby food, diapers, wipes and other infant necessities to new mothers who live below the poverty line

Form 990, Part III, Line 4b:

Jewish Education and Programming The Federation, in cooperation with area synagogues and organizations, offers a wide range of inspiring opportunities that enable teenagers, adults and families to become confident and comfortable lifelong Jewish learners The Federation provides a wide range of Jewish programs throughout the two-county area This category includes programs celebrating Jewish holidays, outreach efforts to the unaffiliated and adult programs for all ages and interests Locally, the Federation conducts outreach within the Jewish and general communities, fostering Israel education and awareness and provides a forum for dealing with anti-Semitism Examples of specific programs funded include * Youth Grants ** Jewish Summer Camp Incentive Grants Studies have proven, overwhelmingly, that Jewish camping experiences serve as a critical tool in Jewish continuity efforts In an effort to encourage area families to send their children to Jewish camps, The Jewish Federation of Sarasota-Manatee awarded $66,900 for 77 students in incentive grants and financial assistance grants in 2018 Children from Sarasota-Manatee attended Jewish overnight camps such as Camp Ramah Darom, Camp Barney Medintz, Camp Judea, Camp Coleman, Camp Blue Star and Kutz Camp ** Religious School Scholarships - Federation provided 85 religious school scholarships totaling $32,585 ** College Scholarships - Federation provided 23 college scholarships totaling $99,500 These funds come from the Foundation ** Leadership Development - Federation provided for 6 high school and college students to attend the AIPAC Policy Conference * Federation-sponsored community-wide educational and cultural programs ensure a strong Jewish identity and to help build a dynamic and engaged Jewish community for generations to come Programs feature speakers on a wide variety of topics * Since its inception The Federation's PJ Library program has enabled close to 900 families with children ages 6 months to 8 years to receive a monthly mailing of Jewish children's books, CDs, or the occasional parent book, for one year Each book and CD came with guides to help families use the selection in their homes Book and music lists were chosen by the foremost early-childhood experts The list includes themes such as Jewish holidays, folktales and Jewish family life * The Jewish Film Festival, the Jewish Federation's largest single outreach program, provides screenings of films and events for the entire community on topics that appeal to a broad range of interests, ages and points of view ** More than 6,000 members of our community attended * The Federation honors its commitment to Holocaust Education through ** The Speakers Bureau, which addresses issues pertaining to Holocaust education in local public and private schools for thousands of students, along with speaking at Rotary clubs, Temples and churches reaching hundreds of adults ** The annual Holocaust Survivors Luncheon, ** And Federation-sponsored Holocaust education programs annually throughout the community, including a Kristallnacht commemoration, a Yom HaShoah Holocaust Remembrance Day program, and an International Holocaust Remembrance Day program

Form 990, Part III, Line 4c:

Sarasota-Manatee Jewish Safety Net Programs The Federation works to ensure that basic needs such as food and shelter are met, as we work for the social, emotional and financial well-being of Jews in Sarasota-Manatee Examples of specific programs funded include * Jewish Healing Program The Federation provides a significant portion of the funding for the Jewish Healing Program, which is implemented by JFCS Each month volunteers provide direct community services to the Jewish community, including Bikkor Cholim (visit the sick), Bereavement Services, Community Religious Outreach (to seniors in nursing homes and assisted living facilities), Prison Ministry and Doula (end-of-life) Services More than 1,858 contacts were made with the Jewish community, helping the most at-risk and isolated to receive spiritual guidance and much-needed human contact * Direct Support for 135+ Holocaust Survivors The Federation underwrites the cost of 2 Case Managers at JFCS who are responsible for providing a variety of services to our area Holocaust Survivors * Religious Outreach Jewish Holidays The Jewish Federation funded Jewish holiday celebrations throughout the year which were held at 12 locations with more than 415 participants, this program is run by the Community Chaplain and JFCS volunteers * All Faiths Food Bank The Federation is one of the main sponsors of the Summer Hunger Program, which provides food to more than 38,000 children in a two-county area * Community Emergency Assistance Fund The Federation provides emergency funding for local Jewish families in need for rent, utilities and food The program is administered through JFCS * Caring for the Jewish Elderly The Federation provides basic human needs such as food, medicines and home care for thousands of elderly Jews in the former Soviet Union received through the Jewish Joint Distribution Committee

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 (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee) Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
ADREA SUKIN DIRECTOR	1 00	X						0	0	0
AL ERNST DIRECTOR	1 00	X						0	0	0
ALAn Ades LIFETIME MEMBER	1 00	X						0	0	0
ALAN SILVERGLAT dIRECTOR	1 00	X						0	0	0
BARBARA ACKERMAN LIFETIME MEMBER	1 00	X						0	0	0
BRUCE UDELL DIRECTOR	1 00	X						0	0	0
BUNNY SKIRBOLL DIRECTOR	1 00	X						0	0	0
CLAIRE LEVIN HONORARY MEMBER	1 00	X						0	0	0
DAVID CHAIFETZ LIFETIME MEMBER	1 00	X						0	0	0
DAVID MILLSTONE DIRECTOR	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 (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
DR LEW HANAN LIFETIME MEMBER	1 00	X						0	0	0
fran braverman diRECTOR	1 00	X						0	0	0
IRENE ROSS DirectOR	1 00	X						0	0	0
IRIS NAHEMOW DIRECTOR	1 00	X						0	0	0
JUDY Weinstein HONORARY MEMBER	1 00	X						0	0	0
JULIE GREEN DIRECTOR	1 00	X						0	0	0
LENNY DREXLER DIRECTOR	1 00	X						0	0	0
LINDA LIPSON DIRECTOR	1 00	X						0	0	0
LOIS STULBERG LIFETIME MEMBER	1 00	X						0	0	0
MARSHA EISENBERG DIRECTOR	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 (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee) Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
MARY GRATEHOUSE DIRECTOR	1 00	X						0	0	0
MELVIN B TAUB dIRECTOR	1 00	X						0	0	0
MERRILL WYNNE DIRECTOR	1 00	X						0	0	0
MICHELLE MITCHELL DIRECTOR	1 00	X						0	0	0
NANCY ROUCHER DIRECTOR	1 00	X						0	0	0
NELLE MILLER HONORARY MEMBER	1 00	X						0	0	0
PETER WELLS Director	1 00	X						0	0	0
ROBERT ISRAELOFF DIRECTOR	1 00	X						0	0	0
SEPI ACKERMAN DIRECTOR	1 00	X						0	0	0
SIMONE KNEGO DIRECTOR	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 (list any hours for related organizations below dotted line)	(C) Position: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
TOM BERNSTEIN LIFETIME MEMBER	1 00	X						0	0	0
MICHAEL RITTER PRESIDENT	1 00	X		X				0	0	0
ANNE SPINDEL VICE PRESIDENT	1 00	X		X				0	0	0
DEBBIE HASPEL SECRETARY PARLIMENTARIAN	1 00	X		X				0	0	0
IAN BLACK VICE PRESIDENT	1 00	X		X				0	0	0
PATTI WERTHEIMER IMMEDIATE PAST PRESIDENT	1 00	X		X				0	0	0
RANDON CARVEL TREASURER	1 00	X		X				0	0	0
ROZ GOLDBERG VICE PRESIDENT	1 00	X		X				0	0	0
STACY HANAN VICE PRESIDENT	1 00	X		X				0	0	0
HOWARD TEVLOWITZ EXECUTIVE DIRECTOR	50 00			X				197,900	0	66,266

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 (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee): Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
INNA SIDEMAN CFO	50 00			X				99,263	0	22,926
ILENE FOX CHIEF DEVELOPMENT OFFICER	50 00					X		125,939	0	21,678

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.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of Sarasota-Manatee Inc

Employer identification number
59-1227747

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

The organization is not a private foundation because it is (For lines 1 through 12, check only one box)

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

2 ☐ A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E (Form 990 or 990-EZ))

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

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

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

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

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

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

9 ☐ An agricultural research organization described in **170(b)(1)(A)(ix)** operated in conjunction with a land-grant college or university or a non-land grant college of agriculture See instructions Enter the name, city, and state of the college or university

10 ☐ An organization that normally receives (1) more than 331/3% 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 331/3% 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)

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

12 ☐ 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 in lines 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g

a ☐ **Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**

b ☐ **Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**

c ☐ **Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**

d ☐ **Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**

e ☐ Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization

f Enter the number of supported organizations

g Provide the following information about the supported organization(s)

(i) Name of supported organization	(ii) EIN	(iii) Type of organization (described on lines 1- 10 above (see instructions))	(iv) Is the organization listed in your governing document? Yes	No	(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
Total						

Part II **Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv), 170(b)(1)(A)(vi), and 170 (b)(1)(A)(ix)**

(Complete only if you checked the box on line 5, 7, 8, or 9 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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grant ")	5,517,222	3,905,568	5,188,799	5,357,629	9,661,585	29,630,803
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						
3 The value of services or facilities furnished by a governmental unit to the organization without charge						
4 **Total.** Add lines 1 through 3	5,517,222	3,905,568	5,188,799	5,357,629	9,661,585	29,630,803
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)						2,964,957
6 **Public support.** Subtract line 5 from line 4						26,665,846

Section B. Total Support

Calendar year (or fiscal year beginning in) ▶	(a)2014	(b)2015	(c)2016	(d)2017	(e)2018	(f)Total
7 Amounts from line 4	5,517,222	3,905,568	5,188,799	5,357,629	9,661,585	29,630,803
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	298,657	310,492	294,432	304,831	270,858	1,479,270
9 Net income from unrelated business activities, whether or not the business is regularly carried on	233,932	243,471	265,759	263,365	210,115	1,216,642
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI)	2,505	360	5,585	28,924	495	37,869
11 **Total support.** Add lines 7 through 10						32,364,584

12 Gross receipts from related activities, etc (see instructions) | 12 | 1,376,583

13 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** . . . . . . ▶ ☐

Section C. Computation of Public Support Percentage

14 Public support percentage for 2018 (line 6, column (f) divided by line 11, column (f)) | 14 | 82 390 %

15 Public support percentage for 2017 Schedule A, Part II, line 14 | 15 | 81 500 %

16a **33 1/3% support test—2018.** 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—2017.** If the organization did not check a 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—2018.** 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 VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization ▶ ☐

b **10%-facts-and-circumstances test—2017.** 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 VI 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 III **Support Schedule for Organizations Described in Section 509(a)(2)**

(Complete only if you checked the box on line 10 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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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) 2014	(b) 2015	(c) 2016	(d) 2017	(e) 2018	(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 VI)						
13 **Total support.** (Add lines 9, 10c, 11, and 12)						

14 **First five years.** If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and **stop here** ▶ ☐

Section C. Computation of Public Support Percentage

15	Public support percentage for 2018 (line 8, column (f) divided by line 13, column (f))	15	
16	Public support percentage from 2017 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage

17	Investment income percentage for **2018** (line 10c, column (f) divided by line 13, column (f))	17	
18	Investment income percentage from **2017** Schedule A, Part III, line 17	18	

19a **331/3% support tests—2018.** 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—2017.** 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 Supporting Organizations

(Complete only if you checked a box on line 12 of Part I If you checked 12a of Part I, complete Sections A and B If you checked 12b of Part I, complete Sections A and C If you checked 12c of Part I, complete Sections A, D, and E If you checked 12d of Part I, complete Sections A and D, and complete Part V)

Section A. All Supporting Organizations

			Yes	No
1	Are all of the organization's supported organizations listed by name in the organization's governing documents? *If "No," describe in **Part VI** how the supported organizations are designated If designated by class or purpose, describe the designation If historic and continuing relationship, explain*	1		
2	Did the organization have any supported organization that does not have an IRS determination of status under section 509 (a)(1) or (2)? *If "Yes," explain in **Part VI** how the organization determined that the supported organization was described in section 509(a)(1) or (2)*	2		
3a	Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? *If "Yes," answer (b) and (c) below*	3a		
b	Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? *If "Yes," describe in **Part VI** when and how the organization made the determination*	3b		
c	Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? *If "Yes," explain in **Part VI** what controls the organization put in place to ensure such use*	3c		
4a	Was any supported organization not organized in the United States ("foreign supported organization")? *If "Yes" and if you checked 12a or 12b in Part I, answer (b) and (c) below*	4a		
b	Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? *If "Yes," describe in **Part VI** how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations*	4b		
c	Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? *If "Yes," explain in **Part VI** what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes*	4c		
5a	Did the organization add, substitute, or remove any supported organizations during the tax year? *If "Yes," answer (b) and (c) below (if applicable) Also, provide detail in **Part VI,** including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document)*	5a		
b	**Type I or Type II only.** Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b		
c	**Substitutions only.** Was the substitution the result of an event beyond the organization's control?	5c		
6	Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (i) its supported organizations, (ii) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (iii) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? *If "Yes," provide detail in **Part VI.***	6		
7	Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in section 4958(c)(3)(C)), a family member of a substantial contributor, or a 35% controlled entity with regard to a substantial contributor? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ)*	7		
8	Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? *If "Yes," complete Part I of Schedule L (Form 990 or 990-EZ)*	8		
9a	Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? *If "Yes," provide detail in **Part VI.***	9a		
b	Did one or more disqualified persons (as defined in line 9a) hold a controlling interest in any entity in which the supporting organization had an interest? *If "Yes," provide detail in **Part VI.***	9b		
c	Did a disqualified person (as defined in line 9a) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? *If "Yes," provide detail in **Part VI.***	9c		
10a	Was the organization subject to the excess business holdings rules of section 4943 because of section 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? *If "Yes," answer line 10b below*	10a		
b	Did the organization have any excess business holdings in the tax year? *(Use Schedule C, Form 4720, to determine whether the organization had excess business holdings)*	10b		

Part IV Supporting Organizations (continued)

			Yes	No
11	Has the organization accepted a gift or contribution from any of the following persons?			
a	A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a		
b	A family member of a person described in (a) above?	11b		
c	A 35% controlled entity of a person described in (a) or (b) above? *If "Yes" to a, b, or c, provide detail in Part VI*	11c		

Section B. Type I Supporting Organizations

			Yes	No
1	Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? *If "No," describe in **Part VI** how the supported organization(s) effectively operated, supervised, or controlled the organization's activities If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year*	1		
2	Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? *If "Yes," explain in **Part VI** how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization*	2		

Section C. Type II Supporting Organizations

			Yes	No
1	Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? *If "No," describe in **Part VI** how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s)*	1		

Section D. All Type III Supporting Organizations

			Yes	No
1	Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (i) a written notice describing the type and amount of support provided during the prior tax year, (ii) a copy of the Form 990 that was most recently filed as of the date of notification, and (iii) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?	1		
2	Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization (s) or (ii) serving on the governing body of a supported organization? *If "No," explain in **Part VI** how the organization maintained a close and continuous working relationship with the supported organization(s)*	2		
3	By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? *If "Yes," describe in **Part VI** the role the organization's supported organizations played in this regard*	3		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year **(see instructions)**

a ☐ The organization satisfied the Activities Test Complete **line 2** below

b ☐ The organization is the parent of each of its supported organizations Complete **line 3** below

c ☐ The organization supported a governmental entity Describe in **Part VI** how you supported a government entity (see instructions)

			Yes	No
2	Activities Test **Answer (a) and (b) below.**			
a	Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? *If "Yes," then in **Part VI identify those supported organizations and explain** how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities*	2a		
b	Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? *If "Yes," explain in **Part VI** the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement*	2b		
3	Parent of Supported Organizations **Answer (a) and (b) below.**			
a	Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? *Provide details in **Part VI.***	3a		
b	Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? *If "Yes," describe in **Part VI.** the role played by the organization in this regard*	3b		

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here ıf the organızatıon satısfıed the Integral Part Test as a qualıfyıng trust on Nov 20, 1970 (explaın ın Part VI) **See instructions.** All other Type III non-functıonally ıntegrated supportıng organızatıons must complete Sectıons A through E

	Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capıtal gaın	1		
2	Recoverıes of prıor-year dıstrıbutıons	2		
3	Other gross ıncome (see ınstructıons)	3		
4	Add lınes 1 through 3	4		
5	Depreciation and depletion	5		
6	Portion of operatıng expenses paıd or ıncurred for production or collection of gross ıncome or for management, conservation, or maintenance of property held for production of ıncome (see ınstructıons)	6		
7	Other expenses (see ınstructıons)	7		
8	**Adjusted Net Income** (subtract lınes 5, 6 and 7 from lıne 4)	8		

	Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see ınstructıons for short tax year or assets held for part of year)	1		
a	Average monthly value of securıtıes	1a		
b	Average monthly cash balances	1b		
c	Faır market value of other non-exempt-use assets	1c		
d	**Total** (add lınes 1a, 1b, and 1c)	1d		
e	**Discount** claımed for blockage or other factors (explaın ın detaıl ın Part VI)			
2	Acquisition ındebtedness applicable to non-exempt use assets	2		
3	Subtract lıne 2 from lıne 1d	3		
4	Cash deemed held for exempt use Enter 1-1/2% of lıne 3 (for greater amount, see ınstructıons)	4		
5	Net value of non-exempt-use assets (subtract lıne 4 from lıne 3)	5		
6	Multıply lıne 5 by 035	6		
7	Recoverıes of prıor-year dıstrıbutıons	7		
8	**Minimum Asset Amount** (add lıne 7 to lıne 6)	8		

	Section C - Distributable Amount			Current Year
1	Adjusted net ıncome for prıor year (from Sectıon A, lıne 8, Column A)	1		
2	Enter 85% of lıne 1	2		
3	Mınımum asset amount for prıor year (from Sectıon B, lıne 8, Column A)	3		
4	Enter greater of lıne 2 or lıne 3	4		
5	Income tax ımposed ın prıor year	5		
6	**Distributable Amount.** Subtract lıne 5 from lıne 4, unless subject to emergency temporary reductıon (see ınstructıons)	6		

7 ☐ Check here ıf the current year ıs the organızatıon's first as a non-functıonally-ıntegrated Type III supportıng organızatıon (see ınstructıons)

Part V Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations (continued)

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in **Part VI**) See instructions	
7 **Total annual distributions.** Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in **Part VI**) See instructions	
9 Distributable amount for 2018 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2018	(iii) Distributable Amount for 2018
1 Distributable amount for 2018 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2018 (reasonable cause required-- explain in Part VI) See instructions			
3 Excess distributions carryover, if any, to 2018			
a From 2013.			
b From 2014.			
c From 2015.			
d From 2016.			
e From 2017.			
f **Total** of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2018 distributable amount			
i Carryover from 2013 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2018 from Section D, line 7 $			
a Applied to underdistributions of prior years			
b Applied to 2018 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2018, if any Subtract lines 3g and 4a from line 2 If the amount is greater than zero, explain in Part VI See instructions			
6 Remaining underdistributions for 2018 Subtract lines 3h and 4b from line 1 If the amount is greater than zero, explain in Part VI See instructions			
7 **Excess distributions carryover to 2019.** Add lines 3j and 4c			
8 Breakdown of line 7			
a Excess from 2014.			
b Excess from 2015.			
c Excess from 2016.			
d Excess from 2017.			
e Excess from 2018.			

Additional Data

Software ID:

Software Version:

EIN: 59-1227747

Name: The Jewish Federation of Sarasota-Manatee Inc

Part VI **Supplemental Information.** Provide the explanations required by Part II, line 10, Part II, line 17a or 17b, Part III, line 12, Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c, Part IV, Section B, lines 1 and 2, Part IV, Section C, line 1, Part IV, Section D, lines 2 and 3, Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b, Part V, line 1, Part V, Section B, line 1e, Part V Section D, lines 5, 6, and 8, and Part V, Section E, lines 2, 5, and 6 Also complete this part for any additional information (See instructions)

Facts And Circumstances Test

efile GRAPHIC print - DO NOT PROCESS | As Filed Data - | DLN: 93493308000299

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," on Form 990, Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of Sarasota-Manatee Inc

Employer identification number
59-1227747

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

		(a) Donor advised funds	(b) Funds and other accounts
1	Total number at end of year	16	
2	Aggregate value of contributions to (during year)	592,242	
3	Aggregate value of grants from (during year)	382,221	
4	Aggregate value at end of year	1,908,445	

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 can 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" on 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 education)
☐ Preservation of an historically important land area
☐ Protection of natural habitat
☐ Preservation of a certified historic structure
☐ Preservation of open space

2 Complete lines 2a through 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	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 7/25/06, and not on a historic structure listed in the National Register	2d	

3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax 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, handling of violations, and enforcing conservation easements during the year ▶ ______

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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 section 170(h)(4)(B)(ii)? ☐ Yes ☐ No

9 In Part XIII, 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" on Form 990, Part IV, line 8.

1a If the organization elected, as permitted under SFAS 116 (ASC 958), 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 XIII, the text of the footnote to its financial statements that describes these items

b If the organization elected, as permitted under SFAS 116 (ASC 958), 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) Revenue included on 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 (ASC 958) relating to these items

a Revenue included on 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 acquisition, 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
d ☐ Loan or exchange programs
b ☐ Scholarly research
e ☐ Other
c ☐ Preservation for future generations

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

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" on 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

			Amount
b	If "Yes," explain the arrangement in Part XIII and complete the following table		
c	Beginning balance	1c	
d	Additions during the year	1d	
e	Distributions during the year	1e	
f	Ending balance	1f	

2a Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability? . . . ☐ Yes ☐ No

b If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII . . . . ☐

Part V Endowment Funds. Complete if the organization answered "Yes" on 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	9,694,696	9,253,033	9,442,746	9,687,718	8,736,154
b Contributions	1,059,241	40,000	37,149	329,906	1,401,614
c Net investment earnings, gains, and losses	-87,541	935,004	492,791	-66,465	137,372
d Grants or scholarships					
e Other expenditures for facilities and programs	540,715	533,341	719,653	508,413	389,017
f Administrative expenses					198,405
g End of year balance	10,125,681	9,694,696	9,253,033	9,442,746	9,687,718

2 Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as

a Board designated or quasi-endowment ▶ 32 090 %

b Permanent endowment ▶ 67 910 %

c Temporarily restricted endowment ▶

The percentages on lines 2a, 2b, and 2c should equal 100%

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by

		Yes	No
(i) unrelated organizations	3a(i)	Yes	
(ii) related organizations	3a(ii)		No
b If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?	3b		

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

Part VI Land, Buildings, and Equipment.
Complete if the organization answered "Yes" on Form 990, Part IV, line 11a. 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		1,022,395		1,022,395
b Buildings		7,971,835	4,032,358	3,939,477
c Leasehold improvements		36,254		36,254
d Equipment		427,652	367,886	59,766
e Other		100,904	43,534	57,370
Total. Add lines 1a through 1e *(Column (d) must equal Form 990, Part X, column (B), line 10(c))* ▶				5,115,262

Part VII Investments—Other Securities. Complete if the organization answered "Yes" on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A) TRACKING UNITS IN JEWISH UNITED FUND OF METROPOLITAN CHICAGO	18,633,045	F
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 12)* ▶	18,633,045	

Part VIII Investments—Program Related.
Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 13)* ▶		

Part IX Other Assets. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 15)* ▶	

Part X Other Liabilities. Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
ANNUITIES & TRUSTS PAYABLE	610,246
FUNDS HELD ON BEHALF OF OTHERS	135,638
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 25)* ▶	745,884

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☑

Part XI Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	9,918,964
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains (losses) on investments	2a	-2,174,821		
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII)	2d	187,284		
e	Add lines **2a** through **2d**			2e	-1,987,537
3	Subtract line **2e** from line **1**			3	11,906,501
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	79,722		
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	79,722
5	Total revenue Add lines **3** and **4c.** (This must equal Form 990, Part I, line 12)			5	11,986,223

Part XII Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	6,232,228
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 XIII)	2d	198,323		
e	Add lines **2a** through **2d**			2e	198,323
3	Subtract line **2e** from line **1**			3	6,033,905
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	79,722		
b	Other (Describe in Part XIII)	4b			
c	Add lines **4a** and **4b**			4c	79,722
5	Total expenses Add lines **3** and **4c.** (This must equal Form 990, Part I, line 18)			5	6,113,627

Part XIII Supplemental Information

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, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b Also complete this part to provide any additional information

Return Reference	Explanation
See Additional Data Table	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Additional Data

Software ID:

Software Version:

EIN: 59-1227747

Name: The Jewish Federation of Sarasota-Manatee Inc

Supplemental Information

Return Reference	Explanation
Part V, Line 4	All endowment funds are administered in accordance with the donor agreement Restricted funds are used for programs to promote Jewish continuity or provide financial assistance in our community Scholarship funds are used to award post high school scholarships to students in our community meeting the required criteria Unrestricted fund is used to support the Jewish Federation of Sarasota-Manatee, Inc (Federation) programs as determined by the Board of Directors The permanently endowed funds are funds held in perpetuity with the income used to implement the Federation mission

Supplemental Information

Return Reference	Explanation
Part X, Line 2	UNDER THE INCOME TAXES TOPIC OF THE FASB ACCOUNTING STANDARDS CODIFICATION, THE FEDERATION HAS REVIEWED AND EVALUATED THE RELEVANT TECHNICAL MERITS OF EACH OF ITS TAX POSITIONS IN ACCORDANCE WITH ACCOUNTING PRINCIPLES GENERALLY ACCEPTED IN THE UNITED STATES OF AMERICA F OR ACCOUNTING FOR UNCERTAINTY IN INCOME TAXES, AND DETERMINED THAT THERE ARE NO UNCERTAIN TAX POSITIONS THAT WOULD HAVE A MATERIAL IMPACT ON THE FINANCIAL STATEMENTS OF THE FEDERAT ION

Supplemental Information

Return Reference	Explanation
Part XI, Line 2d - Other Adjustments	Uncollectible Pledges 198,323 Change in value of Split interest agreement -11,039

Supplemental Information

Return Reference	Explanation
Part XII, Line 2d - Other Adjustments	uncollectible pledges 198,323

SCHEDULE F (Form 990)

Department of the Treasury
Internal Revenue Service

Statement of Activities Outside the United States

▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.

▶ Attach to Form 990.

▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of
Sarasota-Manatee Inc

Employer identification number

59-1227747

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

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

2 **For grantmakers.** Describe in Part V the organization's procedures for monitoring the use of its grants and other assistance outside the United States

3 Activities per Region (The following Part I, line 3 table can be duplicated if additional space is needed)

(a) Region	**(b)** Number of offices in the region	**(c)** Number of employees, agents, and independent contractors in region	**(d)** Activities conducted in region (by type) (e g , fundraising, program services, investments, grants to recipients located in the region)	**(e)** If activity listed in (d) is a program service, describe specific type of service(s) in region	**(f)** Total expenditures for and investments in region
See Add'l Data					
3a Sub-total	0	0			266,262
b Total from continuation sheets to Part I					0
c **Totals** (add lines 3a and 3b)	0	0			266,262

Part II **Grants and Other Assistance to Organizations or Entities Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 15, for any recipient who received more than $5,000. Part II can be duplicated if additional space is needed.

1 (a) Name of organization	(b) IRS code section and EIN (if applicable)	(c) Region	(d) Purpose of grant	(e) Amount of cash grant	(f) Manner of cash disbursement	(g) Amount of non-cash assistance	(h) Description of non-cash assistance	(i) Method of valuation (book, FMV, appraisal, other)

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

(a) Type of grant or assistance	(b) Region	(c) Number of recipients	(d) Amount of cash grant	(e) Manner of cash disbursement	(f) Amount of non-cash assistance	(g) Description of non-cash assistance	(h) Method of valuation (book, FMV, appraisal, other)

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, Return by a U S Transferor of Property to a Foreign Corporation (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 separately file Form 3520, Annual Return to Report Transactions with Foreign Trusts and Receipt of Certain Foreign Gifts, and/or Form 3520-A, Annual Information Return of Foreign Trust With a U S Owner (see Instructions for Forms 3520 and 3520-A, don't file with Form 990)* ☐ 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, Information 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 separately file Form 5713, International Boycott Report (see Instructions for Form 5713, don't file with Form 990)* ☐ Yes ☑ No

Part V **Supplemental Information**

Provide the information required by Part I, line 2 (monitoring of funds); Part I, line 3, column (f) (accounting method; amounts of investments vs. expenditures per region); Part II, line 1 (accounting method); Part III (accounting method); and Part III, column (c) (estimated number of recipients), as applicable. Also complete this part to provide any additional information (see instructions).

990 Schedule F, Supplemental Information

Return Reference	Explanation
Part I, line 3	Payment to overseas is only for specific vendor services The oversight includes receiving the contracted services

Additional Data

Software ID:

Software Version:

EIN: 59-1227747

Name: The Jewish Federation of Sarasota-Manatee Inc

Form 990 Schedule F Part I - Activities Outside The United States

(a) Region	(b) Number of offices in the region	(c) Number of employees or agents in region	(d) Activities conducted in region (by type) (i e , fundraising, program services, grants to recipients located in the region)	(e) If activity listed in (d) is a program service, describe specific type of service(s) in region	(f) Total expenditures for region
Middle East and North Africa	0	0	PROGRAM SERVICE EXPENSES	MISSION TRIP TO ISRAEL	265,198
North America - Canada and Mexico, but not the United States	0	0	PROGRAM SERVICE EXPENSES	JEWISH CAMP FOR KIDS	1,064

SCHEDULE G
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Supplemental Information Regarding Fundraising or Gaming Activities

Complete if the organization answered "Yes" on Form 990, Part IV, lines 17, 18, or 19, or if the organization entered more than $15,000 on Form 990-EZ, line 6a
▶Attach to Form 990 or Form 990-EZ.
▶Go to *www irs gov/Form990* for instructions and the latest information

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of
Sarasota-Manatee Inc

Employer identification number
59-1227747

Part I **Fundraising Activities.** Complete if the organization answered "Yes" on Form 990, Part IV, line 17. Form 990-EZ filers are not required to complete this part.

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

- **a** ☑ Mail solicitations
- **b** ☑ Internet and email solicitations
- **c** ☑ Phone solicitations
- **d** ☑ In-person solicitations
- **e** ☑ Solicitation of non-government grants
- **f** ☑ Solicitation of government grants
- **g** ☑ Special fundraising events

2a Did the organization have a written or oral agreement with any individual (including officers, directors, trustees or key employees listed in Form 990, Part VII) or entity in connection with professional fundraising services? ☑ **Yes** ☐ **No**

b If "Yes," list the ten highest paid individuals or entities (fundraisers) pursuant to agreements under which the fundraiser is to be compensated at least $5,000 by the organization

(i) Name and address of individual or entity (fundraiser)	(ii) Activity	(iii) Did fundraiser have custody or control of contributions? Yes	No	(iv) Gross receipts from activity	(v) Amount paid to (or retained by) fundraiser listed in col (i)	(vi) Amount paid to (or retained by) organization
RICHARD BERGMAN 1255 N GULFSTREAM AVE SARASOTA, FL 34236	DEVELOPMENT CONSULTANT - FUND RAISING AND COMMUNITY OUTREACH		No	4,088,735	150,886	3,937,849
siegel marketing 1845 N Farwell Avenue Suite 300 milwaukee, WI 53202	TELEMARKETING CAMPAIGNS		No	5,426	4,440	986
Total ▶				4,094,161	155,326	3,938,835

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

FL

Part II **Fundraising Events.** Complete if the organization answered "Yes" on Form 990, Part IV, line 18, or reported more than $15,000 of fundraising event contributions and gross income on Form 990-EZ, lines 1 and 6b. List events with gross receipts greater than $5,000.

		(a) Event #1 LION OF JUDAH (event type)	(b) Event #2 MAJOR GIFTS (event type)	(c) Other events (total number)	(d) Total events (add col (a) through col (c))
Revenue	1 Gross receipts	21,750	40,400		62,150
	2 Less Contributions	1,500	15,100		16,600
	3 Gross income (line 1 minus line 2)	20,250	25,300		45,550
Direct Expenses	4 Cash prizes				
	5 Noncash prizes				
	6 Rent/facility costs				
	7 Food and beverages	12,042	14,940		26,982
	8 Entertainment	10,000			10,000
	9 Other direct expenses	7,719	24,870		32,589
	10 Direct expense summary Add lines 4 through 9 in column (d) ▶				69,571
	11 Net income summary Subtract line 10 from line 3, column (d) ▶				-24,021

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

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

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

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

b If "No," explain ____________

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

b If "Yes," explain ____________

11 Does the organization conduct gaming activities with nonmembers? ☐ **Yes** ☐ **No**

12 Is the organization a grantor, beneficiary or trustee of a trust or a member of a partnership or other entity formed to administer charitable gaming? ☐ **Yes** ☐ **No**

13 Indicate the percentage of gaming activity conducted in

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

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

Name ▶

Address ▶

15a Does the organization have a contract with a third party from whom the organization receives gaming revenue? ☐ **Yes** ☐ **No**

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

c If "Yes," enter name and address of the third party

Name ▶

Address ▶

16 Gaming manager information

Name ▶

Gaming manager compensation ▶ $

Description of services provided ▶

☐ Director/officer ☐ Employee ☐ Independent contractor

17 Mandatory distributions

a Is the organization required under state law to make charitable distributions from the gaming proceeds to retain the state gaming license? ☐ Yes ☐ No

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

Part IV **Supplemental Information.** Provide the explanations required by Part I, line 2b, columns (iii) and (v); and Part III, lines 9, 9b, 10b, 15b, 15c, 16, and 17b, as applicable. Also provide any additional information. See instructions.

Return Reference	Explanation
Schedule G, Part I, Line 2b, Column (v)	Richard Bergman - Agreement stipulates fixed renumeration amount for fundraising services plus expenses Consultant submits receipts for expense reimbursement Siegel Marketing - Telemarketing contract stipulates fixed payment per donor contact made by the telemarketing firm or fixed hourly rate depending on the number of records included in the project plus hourly payment for administrative set up

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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," on Form 990, Part IV, line 21 or 22.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of Sarasota-Manatee Inc

Employer identification number
59-1227747

Part I General Information on Grants and Assistance

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

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

Part II Grants and Other Assistance to Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" on Form 990, Part IV, line 21, for any recipient that received more than $5,000 Part II can be duplicated if additional space is needed

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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 noncash assistance	**(h)** Purpose of grant or assistance
(1) See Additional Data							
(2)							
(3)							
(4)							
(5)							
(6)							
(7)							
(8)							
(9)							
(10)							
(11)							
(12)							

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . ▶ 54

3 Enter total number of other organizations listed in the line 1 table . . . . ▶ 0

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on Form 990, Part IV, line 22
Part III can be duplicated if additional space is needed

(a) Type of grant or assistance	(b) Number of recipients	(c) Amount of cash grant	(d) Amount of noncash assistance	(e) Method of valuation (book, FMV, appraisal, other)	(f) Description of noncash assistance
(1) SCHOLARSHIPS	198	213,313			
(2)					
(3)					
(4)					
(5)					
(6)					
(7)					

Part IV **Supplemental Information.** Provide the information required in Part I, line 2; Part III, column (b); and any other additional information.

Return Reference	Explanation
Part I, Line 2	Grantees are required to submit written final reports upon completion of the grant Exceptions are made for operating grants from donor advised funds and donor recommended grants

Additional Data

Software ID:
Software Version:
EIN: 59-1227747
Name: The Jewish Federation of Sarasota-Manatee Inc

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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
ACT for America 295 Bendix Road No 260 Virginia Beach, VA 23452	26-0772227	501(c)(3)	5,750				General
All Faiths Food Bank Inc 8171 Blaikie Ct Sarasota, FL 34240	65-0115814	501(c)(3)	65,500				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC section if applicable	**(d)** Amount of cash grant	**(e)** Amount of non-cash assistance	**(f)** Method of valuation (book, FMV, appraisal, other)	**(g)** Description of non-cash assistance	**(h)** Purpose of grant or assistance
American Freedom Defense Initiative 1040 1st Ave PO Box 121 New York, NY 10022	27-2518993	501(c)(3)	5,750				General
American Friends of Leket Israel Inc PO Box 2090 Teaneck, NJ 076661490	20-8202424	501(c)(3)	30,197				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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American Friends of Magen David Adom 1900 NW Corporate Blvd Suite W310 Boca Raton, FL 33431	13-1790719	501(c)(3)	37,000				General
American Friends of Yad Eliezer 1102 East 26th St Brooklyn, NY 11210	11-3459952	501(c)(3)	10,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC section if applicable	(d) Amount of cash grant	(e) Amount of non-cash assistance	(f) Method of valuation (book, FMV, appraisal, other)	(g) Description of non-cash assistance	(h) Purpose of grant or assistance
American Technion Society 55E 59th Street Floor 14 New York, NY 101262385	13-0434195	501(c)(3)	80,000				General
Asolo Repertory Theatre 5555 N Tamiami Trail Sarasota, FL 34243	59-2717909	501(c)(3)	7,500				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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
Case Alumni Association Fund Tomlinson Hall Rm 109 10900 Euclid Ave Cleveland, OH 441067073	20-4435833	501(c)(3)	25,000				General
Chabad of Bradenton c/o Rabbi Mendy Bukiet 5712 Lorraine Rd Bradenton, FL 34211	20-1636179	501(c)(3)	20,929				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Chabad of Sarasota 7700 S Beneva Rd Sarasota, FL 34238	65-0234425	501(c)(3)	28,555				General
Chabad of Venice & North Port Fl Inc 2169 S Tamiami Trail Venice, FL 34293	20-2799569	501(c)(3)	26,985				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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Champaign-Urbana Jewish Federation 503 E John Street Champaign, IL 61820	23-7344693	501(c)(3)	7,000				General
Chaverim Israel Family Services Inc Attn Hershy Zwebner2535 JFK Blvd Jersey City, NJ 07304	20-1385707	501(c)(3)	15,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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
Coexistence Inc (dba Embracing Our Differences) PO Box 2559 Sarasota, FL 342302559	20-3581293	501(c)(3)	55,420				General
Embracing Our Differences PO Box 2559 Sarasota, FL 342302559	20-3581293	501(c)(3)	7,500				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Endowment for Middle East Truth 1050 Connecticut Ave NW 10th Floor Washington, DC 20036	20-4329740	501(c)(3)	5,000				General
Friends of the IDF 7700 Congress Ave Ste 3207 Boca Raton, FL 33487	13-3156445	501(c)(3)	5,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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 Yashar L'Chayal Inc 20 Chalmers Rd East Brunswick, NJ 08816	20-8021512	501(c)(3)	19,874				General
Greater Newtown Community Redevelopment Corp 2729 North Osprey Avenue Sarasota, FL 34234	65-0800942	501(c)(3)	5,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	**(b)** EIN	**(c)** IRC 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
Gulf Coast Community Foundation 601 Tamiami Trail South Venice, FL 34293	59-1052433	501(c)(3)	12,391				General
Hadassah 50 West 58th Street New York, NY 10019	13-1656651	501(c)(3)	11,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Hand in Hand PO Box 80102 Portland, OR 97280	93-1269590	501(c)(3)	28,000				General
Hershorin Schiff Day Schools of Tomorrow 1050 S Tuttle Ave Sarasota, FL 34237	47-3558984	501(c)(3)	96,400				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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 Tennis Centers Foundation Inc 432 Park Avenue South New York, NY 10016	13-2961273	501(c)(3)	113,000				General
Jewish Federation of Greater Buffalo 787 Delaware Avenue Buffalo, NY 14209	16-0743210	501(c)(3)	5,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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 Housing Council Foundation Inc 1951 N Honore Ave Sarasota, FL 34235	20-0910348	501(c)(3)	21,883				General
Jewish National Fund 1951 NW 19th St Suite A-100 Boca Raton, FL 33431	13-1659627	501(c)(3)	23,900				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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JFCS of the Suncoast 2688 Fruitville Road Sarasota, FL 34237	59-2693318	501(c)(3)	259,111				General
Judicial Watch Inc Attn Dir of Devel 425 Third St SW Ste 800 Washington, DC 20024	52-1885088	501(c)(3)	6,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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Life Town Inc 10 Microlab Rd Livingston, NJ 07039	45-4435140	501(c)(3)	6,000				General
Mote Marine Laboratory 1600 Ken Thompson Pkway Sarasota, FL 34236	59-0756643	501(c)(3)	10,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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Neve Michael Children's Village PO Box 260067 Pembroke Pines, FL 33026	20-8499330	501(c)(3)	40,000				General
PEF Israel Endowment Funds Inc 630 Third Avenue 15th Floor New York, NY 10017	13-6104086	501(c)(3)	11,250				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Perlman Music ProgramSuncoast Inc PO Box 3407 Sarasota, FL 34230	26-2714384	501(c)(3)	15,175				General
Ringling College of Art and Design Inc 2700 N Tamiami Trl Sarasota, FL 34234	59-0637903	501(c)(3)	55,000				General

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Sarasota Ballet 5555 North Tamiami Trail Sarasota, FL 34243	65-0135900	501(c)(3)	5,000				General
Sarasota Film Festival 332 Cocoanut Avenue Sarasota, FL 34236	65-0826229	501(c)(3)	6,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Sarasota Orchestra 709 N Tamiami Trail Sarasota, FL 34236	59-2603081	501(c)(3)	11,240				General
Slow Money San Luis Obispo 1288 11th St Los Osos, CA 93402	82-2069002	501(c)(3)	25,000				General

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Temple Beth Israel 567 Bay Isles Road Longboat Key, FL 34228	59-1970401	501(c)(3)	5,000				General
Temple Beth Sholom 1050 s Tuttle Ave Sarasota, FL 34237	23-7156328	501(c)(3)	34,450				General

Form 990, Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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Temple Emanu-el 151 S McIntosh Road Sarasota, FL 34232	59-1145961	501(c)(3)	11,425				General
Temple Sinai 4631 S Lockwood Ridge Rd Sarasota, FL 34231	59-3056302	501(c)(3)	18,121				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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The American Jewish Joint Distribution Committee Inc 711 Third Ave 10th Floor New York, NY 10017	13-1656634	501(c)(3)	18,100				General
The Clarion Project (Clarion Fund Inc) 1717 Pennsylvania Avenue NW No 1025 Washington, DC 20006	20-5845679	501(c)(3)	40,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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The Investigative Project on Terrorism Foundation 5614 Connecticut Ave NW 3 Washington, DC 20015	13-4331855	501(c)(3)	25,000				General
The Jewish Agency for Israel 633 3rd Avenue 21st Floor New York, NY 10017	23-7254561	501(c)(3)	83,922				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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 North America Inc 25 Broadway Suite 1700 New York, NY 100041010	13-1624240	501(c)(3)	285,241				General
Thomas More Law Center PO Box 393 Ann Arbor, MI 48106	38-3448297	501(c)(3)	10,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
Tickets for Kids Charities 700 Blaw Avenue No 105 Pittsburch, PA 15238	02-0559825	501(c)(3)	7,000				General
Van Wezel Performing Arts Hall 777 N Tamiami Trail Sarasota, FL 34236	59-2807055	501(c)(3)	25,000				General

Form 990,Schedule I, Part II, Grants and Other Assistance to Domestic Organizations and Domestic Governments.

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Visible Men Academy Inc 921 63rd Ave East Bradenton, FL 34203	46-0930264	501(c)(3)	5,000				General
Yad Ezra V'Shulamit Attn Tami Ellison 3470 Wilshire Blvd Ste 1020 Los Angeles, CA 90010	46-0477228	501(c)(3)	5,000				General

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Schedule J (Form 990)

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees
▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 23.
▶ Attach to Form 990.
▶ Go to *www.irs.gov/Form990* for instructions and the latest information.

Department of the Treasury
Internal Revenue Service

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of
Sarasota-Manatee Inc

Employer identification number
59-1227747

Part I Questions Regarding Compensation

			Yes	No
1a	Check the appropiate box(es) if the organization provided any of the following to or for a person listed on 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 of the expenses described above? If "No," complete Part III to explain	**1b**		
2	Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?	**2**		
3	Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director Check all that apply Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III ☑ 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 on 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**		No
c	Participate in, or receive payment from, an equity-based compensation arrangement? If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III	**4c**		No
	Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.			
5	For persons listed on 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? If "Yes," on line 5a or 5b, describe in Part III	**5b**		No
6	For persons listed on 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? If "Yes," on line 6a or 6b, describe in Part III	**6b**		No
7	For persons listed on Form 990, Part VII, Section A, line 1a, did the organization provide any nonfixed payments not described in lines 5 and 6? If "Yes," describe in Part III	**7**		No
8	Were any amounts reported on Form 990, Part VII, paid or accured pursuant to a contract that was subject to the initial contract exception described in Regulations section 53 4958-4(a)(3)? If "Yes," describe in Part III	**8**		No
9	If "Yes" on line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?	**9**		

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

For each individual whose compensation must be reported on 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, applicable column (D) and (E) amounts for that individual

(A) Name and Title		(B) Breakdown of W-2 and/or 1099-MISC compensation			(C) Retirement and other deferred compensation	(D) Nontaxable benefits	(E) Total of columns (B)(i)-(D)	(F) Compensation in column (B) reported as deferred on prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 HOWARD TEVLOWITZ EXECUTIVE DIRECTOR	(i)	184,201	10,000	3,699	37,616	28,650	264,166	0
	(ii)	0	0	0	0	0	0	0

Part III **Supplemental Information**

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II Also complete this part for any additional information

Schedule L (Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service

Transactions with Interested Persons

▶ Complete if the organization answered "Yes" on Form 990, Part IV, lines 25a, 25b, 26, 27, 28a, 28b, or 28c, or Form 990-EZ, Part V, line 38a or 40b.
▶ Attach to Form 990 or Form 990-EZ.
▶Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of
Sarasota-Manatee Inc

Employer identification number
59-1227747

Part I Excess Benefit Transactions (section 501(c)(3), section 501(c)(4), and 501(c)(29) organizations only)

Complete if the organization answered "Yes" on Form 990, Part IV, line 25a or 25b, or Form 990-EZ, Part V, line 40b

1 (a) Name of disqualified person	(b) Relationship between disqualified person and organization	(c) Description of transaction	(d) Corrected? Yes	No

2 Enter the amount of tax incurred by organization managers or disqualified persons during the year under section 4958 . . . ▶ $

3 Enter the amount of tax, if any, on line 2, above, reimbursed by the organization . . . ▶ $

Part II Loans to and/or From Interested Persons.

Complete if the organization answered "Yes" on Form 990-EZ, Part V, line 38a, or Form 990, Part IV, line 26, or if the organization reported an amount on Form 990, Part X, line 5, 6, or 22

(a) Name of interested person	(b) Relationship with organization	(c) Purpose of loan	(d) Loan to or from the organization?		(e) Original principal amount	(f) Balance due	(g) In default?		(h) Approved by board or committee?		(i) Written agreement?	
			To	From			Yes	No	Yes	No	Yes	No
Total				▶ $								

Part III Grants or Assistance Benefiting Interested Persons.

Complete if the organization answered "Yes" on Form 990, Part IV, line 27.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of assistance	(d) Type of assistance	(e) Purpose of assistance
See Additional Data Table				

Part IV **Business Transactions Involving Interested Persons.**

Complete if the organization answered "Yes" on Form 990, Part IV, line 28a, 28b, or 28c.

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of transaction	(d) Description of transaction	(e) Sharing of organization's revenues? Yes	No

Part V **Supplemental Information**

Provide additional information for responses to questions on Schedule L (see instructions)

Return Reference	Explanation

Additional Data

Software ID:
Software Version:
EIN: 59-1227747
Name: The Jewish Federation of Sarasota-Manatee Inc

Form 990, Schedule L, Part III - Grants or Assistance Benefiting Interested Persons

(a) Name of interested person	(b) Relationship between interested person and the organization	(c) Amount of grant or type of assistance
(1) JACOB GREEN	FAMILY MEMBER OF DIRECTOR	1,500
(2) ALEX HANAN	FAMILY MEMBER OF DIRECTOR	2,500
(3) OLIVIA KNEGO	FAMILY MEMBER OF DIRECTOR	5,000
(4) ABE PINTCHUCK	FAMILY MEMBER OF EMPLOYEE	5,000
(5) EMMA KATZ	FAMILY MEMBER OF EMPLOYEE	5,000
(6) MELANIE GREEN	FAMILY MEMBER OF DIRECTOR	400
(7) NOAH KNEGO	FAMILY MEMBER OF DIRECTOR	400
(8) MILION KNEGO	FAMILY MEMBER OF DIRECTOR	650

SCHEDULE M
(Form 990)

Department of the Treasury
Internal Revenue Service

Noncash Contributions

▶Complete if the organizations answered "Yes" on Form 990, Part IV, lines 29 or 30.
▶ Attach to Form 990.
▶Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization
The Jewish Federation of
Sarasota-Manatee Inc

Employer identification number
59-1227747

Part I Types of Property

	(a) Check if applicable	(b) Number of contributions or items contributed	(c) Noncash contribution amounts reported on Form 990, Part VIII, line 1g	(d) Method of determining noncash contribution amounts
1 Art—Works of art				
2 Art—Historical treasures				
3 Art—Fractional interests				
4 Books and publications				
5 Clothing and household goods				
6 Cars and other vehicles				
7 Boats and planes				
8 Intellectual property				
9 Securities—Publicly traded	X	21	1,511,840	NYSE
10 Securities—Closely held stock				
11 Securities—Partnership, LLC, or trust interests				
12 Securities—Miscellaneous				
13 Qualified conservation contribution—Historic structures				
14 Qualified conservation contribution—Other				
15 Real estate—Residential				
16 Real estate—Commercial				
17 Real estate—Other				
18 Collectibles				
19 Food inventory				
20 Drugs and medical supplies				
21 Taxidermy				
22 Historical artifacts				
23 Scientific specimens				
24 Archeological artifacts				
25 Other ▶ (__________)				
26 Other ▶ (__________)				
27 Other ▶ (__________)				
28 Other ▶ (__________)				

29 Number of Forms 8283 received by the organization during the tax year for contributions for which the organization completed Form 8283, Part IV, Donee Acknowledgement | 29 |

			Yes	No
30a	During the year, did the organization receive by contribution any property reported in Part I, lines 1 through 28, that it must hold for at least three years from the date of the initial contribution, and which is not required to be used for exempt purposes for the entire holding period?	30a		No
b	If "Yes," describe the arrangement in Part II			
31	Does the organization have a gift acceptance policy that requires the review of any nonstandard contributions?	31	Yes	
32a	Does the organization hire or use third parties or related organizations to solicit, process, or sell noncash contributions?	32a	Yes	
b	If "Yes," describe in Part II			
33	If the organization did not report an amount in column (c) for a type of property for which column (a) is checked, describe in Part II			

Part II Supplemental Information.

Provide the information required by Part I, lines 30b, 32b, and 33, and whether the organization is reporting in Part I, column (b), the number of contributions, the number of items received, or a combination of both. Also complete this part for any additional information.

Return Reference	Explanation
Part I, Line 32b	Federation uses 3rd party vendor, Donate a Car, for its auto donations The 3rd party vendor receives the donation, processes the required paperwork, disposes of the automobile and remits the net amount to the Federation

efile GRAPHIC print - DO NOT PROCESS	As Filed Data -	DLN: 93493308000299

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 990-EZ or to provide any additional information.
▶ Attach to Form 990 or 990-EZ.
▶ Go to *www.irs.gov/Form990* for the latest information.

OMB No 1545-0047

2018

Open to Public Inspection

Name of the organization	Employer identification number
The Jewish Federation of Sarasota-Manatee Inc	59-1227747

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part I, Line 6 Volunteers	Federation volunteers served on various committees, boards, assisted with set up, breakdown, and registration for Federation events and programs In addition the volunteers assisted with stuffing envelopes and various mailings

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 2	DR LEWIS HANAN (DIRECTOR) AND STACY HANAN (DIRECTOR) ARE FATHER IN LAW AND DAUGHTER IN LAW BARBARA ACKERMAN AND SEPI ACKERMAN ARE MOTHER IN LAW AND DAUGHTER IN LAW

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	Summary of Changes to the Bylaws ARTICLE 1 Name The name will be officially changed to th e D/B/A/ Federation has been using for the past several years - The Jewish Federation of S arasota-Manatee, Inc - upon approval of the Articles of Incorporation ARTICLE 2 Purpose This Article was changed so as to be identical to the Purpose and Powers provisions of th e Articles of Incorporation ARTICLE 3 Prohibited Activities - New Article The provisions of this Article were previously contained in Article 2, however, the Governance Committee felt this should be a separate Article While these prohibited activities are required to be included Articles of Incorporation but not in Bylaws, the Committee chose to include t he identical language of the Purposes and Powers and Prohibited Activities both as a refer ence to what the Articles of Incorporation provide, as well as a reminder that any future changes to these provisions will necessitate an amendment to the Articles of Incorporation as well ARTICLE 4 Offices (Article 3 of old Bylaws) No changes ARTICLE 5 Members (Arti cle 4 of old Bylaws) 5 1 Individual Member (Old 4 1) - has been changed to add the age of 18, and is identical to the language of the new Articles of Incorporation 5 2 Annual Memb ership Meeting (Old 4 3) - No substantive change 5 3 Notice (Old 4 4) - eliminated the req uirement to include the names and terms of Officers and Directors on the notice of the ann ual membership meeting The reason for the change is that the Board Annual Membership meet ing usually takes place in November and the Annual Meeting of the Board of Director meetin g - at which Officers and Directors are elected, may take place after the Membership meeti ng 5 4 Special Meetings (Old 4 6) - can now only be called by the President - eliminated right of Vice President, other Officers and members to call such meeting 5 5 Notice (Old 4 7) - No substantive change 5 6 Right to Vote (Old 4 5) - No substantive change 5 7 Quo rum (Old 4 8) - No change Article 4 2 of the old Bylaws - Member Privileges - was elimina ted, and the Members right to vote is included in the new Article 5 6 - Right to Vote ART ICLE 6 Directors (Article 5 of old Bylaws) - separated certain Articles into individual A rticles for clarification 6 1 General Powers - (Old 5 1) - changed to reflect return to t he full, broader power and authority of the Board of Directors 6 2 Number of Directors (p art of old 5 2) - has been changed to a minimum of 11 and maximum of 29 to provide for an odd number 6 3 Qualification (Old 5 2 1) - simply clarified language - no content change 6 4 Election - (part of old 5 2) added that Directors shall be elected at the Annual meeti ng of the Board of Directors - this was not clearly specified in the old Bylaws 6 5 Term and Term Limit (part of old 5 2) - no change in three year term or 2 three year term limit s - but adds and clarifies that the terms coincide with the Federation's fiscal year 6 5 1 Staggered Terms (Old 5 2 2)

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	- corrects mistake regarding 1/3 of the Board - it is actually 1/6th of the Board that may be terming off each year because each director is eligible to serve for two consecutive t erms 6 5 2 - Tolling - new provision - The time served as an officer is not counted again st time served as a director for purposes of the term limits This is a common practice an d the rationale is to allow individuals enough time to gain appropriate experience on the board to be elected to officer positions, and then have enough time left to be able to ser ve in those positions without their terms expiring This is actually what we have been doi ng - it just wasn't provided for in the Bylaws 6 6 Lifetime Directors (Old 5 2 3 Honorary Directors) - the changes to this provision clarifies several issues regarding this class of directors The term "honorary" infers that these directors are not actually voting memb ers of the Board - but in our case, they are voting members - so the name for this class h as been changed to "Lifetime" Directors In effect, the concept for this category was to h onor and keep individuals who have served as Federation Directors in an extraordinary mann er, and desire and intend to remain, very engaged with the Federation in the future This should not be an "automatic" appointment once someone has reached their 6 year term limit (two consecutive 3 year terms) - but rather - should reflect exceptional service and desir e to remain involved So we have included that going forward, to be eligible, the individu al must have served on the Board for a minimum of 12 years This provision also provides t hat these individuals shall have a "lifetime" appointment - however they are subject to al l other requirements that elected directors are subject to - including attendance requirem ents, etc , and may be removed should they no longer remain involved 6 7 Duties of Direct ors - new provision The Governance Committee will be drafting policies for Board of Direc tor's duties and Board evaluations 6 8 Vacancy (Old 5 3) - added that if the time remaini ng in the original term is less than one half of the three year term, that individual may be elected for two full three year terms after completing the unexpired term 6 9 Resignat ion (Old 5 4) - added that if a director fails to attend five consecutive Board meetings w ithout having been granted a leave of absence, it shall be considered a resignation The r eason for this is we need Board members to attend and participate, and if someone misses 5 consecutive Board meetings it demonstrates a lack of interest in the organization and the ir responsibilities We must have a quorum in attendance at all meetings, and if Directors fail to attend the Board cannot function effectively 6 10 Leave of Absence - new provisi on - this was added to allow for Board members who have illnesses or other extenuating cir cumstances to be relieved of their responsibilities for up to one year without attendance penalty 6 11 Removal of Direc

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	tors (Old 5 5) - added language regarding giving notice to the Director being considered for removal, eliminated the language regarding three Directors, and increased the number o f meetings missed as cause for removal from 3 meetings to 4 ARTICLE 7 Meetings of the Di rectors (Article 6 of old Bylaws) 7 1 Regular Meetings (Old 6 1) - increased the minimum n umber of regular meetings from four to six 7 2 Annual Meeting - new provision - this prov ision designates the meeting at which new Officers and Directors shall be elected for the upcoming fiscal year, and that this meeting shall take place within 60 days prior to the b eginning of the new fiscal year 7 3 Special Meetings (Old 6 2) - no substantive change 7 4 Place of Meeting (Old 6 3) - no substantive change 7 5 Notice of Meetings (Old 6 4) - clarified the number of days required for notice is calendar days, and also added 24 hour notice for emergency meetings 7 6 Waiver of Notice (Old 6 5) - no substantive change 7 7 Quorum - (Old 6 6) - included Honorary (now Lifetime) Directors as they are voting member s of the Board Added language to allow a meeting to be called without a quorum present, b ut that matters requiring a vote may be delayed in the event Directors arrive late for the meeting Added language to allow matters left unresolved because a quorum wasn't achieved to be handled informally per Article 7 10 so that urgent votes do not have to be delayed until the next Board meeting Also added language that a meeting held without a quorum pre sent constitutes a meeting held for purposes of satisfying the required number of meetings 7 8 Voting (Old 6 7) - added that Directors may not vote upon any matter in which they a re deemed to have a conflict of interest 7 9 Manner of Acting (Old 6 8) - clarified the n umber of votes required to approve certain actions - generally it is the majority of those present at a meeting in which there is a quorum However, to amend the Bylaws or Articles of Incorporation, or to elect or remove Officers and Directors, there must be a majority of the full Board of Directors For example - if there are a total of 35 directors entitle d to vote - 18 votes are needed to approve these actions Also - buy, sell, lease or dispo se of the majority of the assets of Federation, or to approve a plan to dissolve or merge the Federation, an even greater number of votes is required - for example - if there are 3 5 voting members, 2/3 of them - or 24 directors - must vote in favor of the proposal 7 10 Informal Action by Directors (Old 6 9) - Added that the written votes shall be maintained in the Corporate Minute Book

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	Summary of Changes to the Bylaws (cont'd) 7 11 Agenda - new provision This - together wit h 7 11 1 - clarifies the old 6 10 - Consent Agenda Every meeting has an agenda - but we d o not usually operate under a "consent agenda procedure as provided in the old Bylaws The se changes give us the option to do so - without requiring it be done so for every meeting ARTICLE 8 Officers 8 1 Roster of Officers - changes the designation of Secretary/Parlia mentarian to Secretary/Governance Officer and 8 1 1 adds a provision for President Elect 8 2 Qualification - new provision - Added requirement that an individual must have served on the Board for at least a year before becoming eligible to become an Officer 8 3 Electio n and Term (Old 8 2) - Added definitive term limits for Officers Old Bylaws allowed Offic ers to serve indefinitely by allowing them to be immediately elected to different Officer positions after serving for three terms Proposed change limits term to a total of 3 conse cutive two year terms regardless of office held - with the exception of the President, Pre sident Elect and Immediate Past President The President is limited to 2 consecutive two y ear terms, and positions of President Elect and Immediate Past President are, by necessity , subject to the term of the then President 8 4 Vacancy - new provision - added to allow vacancy of an Officer position to be filled in same manner as a vacancy on the full Board 8 5 Removal (Old 8 3) - changed to provide more specifics - now allows removal to be done in the same manner as removal of a Director at Large 8 6 President of the Board of Direc tors (Old 8 4) - changed to allow President to be an ex-officio member of the Nominating C ommittee The President should have a voice in selecting the team of Directors he or she w ill be working with 8 7 Vice-Presidents of the Board of Directors (Old 8 5) - no substant ive change 8 8 Secretary/Governance Officer (Old 8 6) - changed title of Parliamentarian to Governance Officer - and added responsibility of chairing Governance Committee 8 9 Tre asurer (Old 8 7) - added that the Treasurer shall be the Chair of the Finance/Investment C ommittee 8 10 Immediate Past President - new provision Added this as there was no specif ic position - although there were duties (chairing Nominating Committee) - for the Immedia te Past President contained in the old Bylaws ARTICLE 9 Executive Committee - This was m ade a separate Article rather than a sub-article (old 7 4 of Committees) - and changed the name from Operating to Executive Committee 9 1 Executive Committee (Old 7 4) - added req uirement for minimum of one year of service on Board of Directors to be eligible 9 2 Meet ings (Old 7 4 1) Increased minimum number of meetings from 8 to 10 9 3 Quorum (Old 7 4 1A) Added same language regarding a quorum that pertains to the Board of Directors - i e - calling a meeting without a quorum but holding voting until a quorum is present, etc 9 4 Informal Action by Executive C

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	ommittee - new provision - allows for same requirements for informal action as provided to the Board of Directors 9 5 Authority (Old 7 4 1C) Limited the scope of authority of the old Operating Committee so as to give more power back to the full Board 9 5 a - g - added specific limitations on the authority of the Executive Committee relating to certain majo r actions 9 6 Report to the Board - new provision - added requirement that the actions ta ken by the Executive Committee shall be regularly reported to the full Board ARTICLE 10 Committees (Article 7 of Old Bylaws) 10 1 Committees (Old 7 1) - No substantive change 10 2 Committee Chairs (Old 7 2) - Added that non-Board members may serve on committees,and th at the CEO can designate staff liaisons to assist committees - but that staff shall not be considered a voting member of the committee 10 3 Standing Committees (Old 7 3) - Elimina ted Operating Committee and added Personnel and Governance Committees 10 3 1 Audit Committ ee (Old 7 5) - (b) - Added number of meetings needed annually 10 3 2 Finance/Investment Co mmittee (Old 7 6) - Added requirement that Treasurer shall be the Chair Also replaced ref erences that budgets shall be submitted "to the Operating Committee for approval" with "to the Board of Directors for approval" Added that one meeting is required per quarter 10 3 3 Governance Committee - new provision New standing committee to be chaired by Secretar y/Governance Officer and responsible for reviewing all governance documents, policies and matters 10 3 4 Personnel Committee - new provision - We have had a Personnel Committee fo r quite some time and decided to declare it a standing committee This committee will be r esponsible for working with the Human Resources staff and reviewing personnel policies, co mpensation structure, etc , as well as CEO contract, salary and annual evaluations 10 3 5 Community Relations Committee - new provision - Another long time committee that deals wi th Federation's public affairs matters The Governance Committee also recommends that this be a standing committee 10 3 6 Nominating Committee (Old 7 7) - increased the membership of the committee to include members of the community at large 10 4 Vacancies (Old 7 9) - added "with the approval of the President" 10 5 Special Meetings - new provision - added to allow special meetings to be called 10 6 Notice of Meetings (Old 7 10) - removed prov ision that Notice cannot exceed 60 days and added 24 hour notice for special or emergency meetings 10 7 Waiver of Notice (Old 7 11) No substantive change 10 8 Quorum (Old 7 12) C hanged to allow the same requirements as for Board and Executive Committee meetings as far as calling meeting without a quorum, etc 10 9 Informal Action by Committees - new provis ion - Added to allow same informal action as allowed for Board and Executive Committee - w ritten affirmative vote of 2/3 of total members 10 10 Voting (Old 7 13) - No substantive change Old Article 7 14 - Exp

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	enditures - was elıminated Our committees generally do no have expenses - except event co mmittees which are not covered by these Bylaws - and to the extent they do, that should be provided ın the annual budget ARTICLE 11 General Provisions 11 1 Notices - added that n otice of emergency meetings may be gıven by personal delivery, electronic or telephonic me ans 11 2 Electronic Presence (Old 11 4) - No substantive change 11 3 Proxy Voting (Old 1 1 5) - No change Old Article 11 2 - Amendments - thıs Article has been elıminated and ıs now covered separately by Artıcle 16 Old Article 11 3 - Parlıamentary Authority - has bee n elıminated No one even knew what the referenced RULES OF ORDER were Our authority ıs n ow the new Bylaws Old Articles 11 6 through 11 10 are now contained ın Artıcle 13 Operat ıons ARTICLE 12 Chief Executive Officer (Article 9 Employment of Old Bylaws) 12 1 Chief Executive Officer (Old 9 1 - Executive Director) - changed the title to CEO 12 2 Duties of the Chief Executive Director (Old 9 2) - No substantive change 12 3 Review (Old 9 3) - No substantive change ARTICLE 13 Operations - New Article 13 1 Fiscal Year - was previo usly contained ın Old 11 7 - Finance 13 2 Finances (Old 11 7) - No substantive change 13 3 Stock and Dividends - new provision - Federation shall ıssue no stock or dividends 13 4 Compensation/Services (Old 11 6) - No substantive changes 13 5 Loans - new provision - F ederation shall not make loans to Officers, Directors or employees 13 6 Fiscal and Contra ctual Obligations - new provision - provides that no Officer, Director or employee can ent er into a contract on behalf of Federation unless approved by the Board or Executive Commı ttee or the cost ıs already contained ın the approved budget 13 7 Signatories (Old 11 8) - elıminated policies and procedures of the Operating Committee The policy regarding this was approved by the Board 13 8 Bonding/Crime Insurance Policy (Old 11 9) - added that th e cost of the policy shall be paid by Federation 13 9 Corporate Minute Book (Old 11 10) - No substantive change ARTICLE 14 Indemnification (Article 10 of old Bylaws) 14 1 Condit ıons (Old 10 1) - added that no indemnification will be provided for fraudulent acts and c riminal conduct Also added extension of coverage to indemnitees' heirs, legal representat ıves, successors and assigns 14 2 Determination (Old 10 2) - elıminated that the determin ation could be made by a committee of directors who were not party to the claim The Gover nance Committee felt that this ıs something that should be addressed by the full Board

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 4	Summary of Changes to the Bylaws (cont'd) ARTICLE 15 Dissolution (Article 12 of old Bylaws) 15 1 (Old 12 1) - included Section 170(c)(2) of the Internal Revenue Code which defines corporations entitled to receive charitable contributions ARTICLE 16 Amendments (Article 11 2 of old Bylaws) 16 1 - changed the vote necessary from 3/4 of the Directors present at the meeting to a majority of the full Board of Directors This ensures that the majority of the Board approves the amendments whereas 3/4 of a quorum may not represent the majority Also eliminated the language requiring that amendments shall be consistent with state and federal law as that is understood and not necessary to include - and to the extent the Bylaws are deemed contrary to Florida Law, Article 17 provides that Florida Law shall control ARTICLE 17 Effective Date (Article 13, Revised By Laws of Old Bylaws) 17 1 Acceptance and Effective Date - will provide the date that these amended Bylaws were approved by the Board, and also that to the extent that the Bylaws conflict with any provision of the Articles of Incorporation or Florida Law, the AOI or Florida Law shall control

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 6	ACCORDING TO THE ORGANIZATION'S BY-LAWS, A DONOR WHO HAS MADE A CONTRIBUTION TO THE FEDERATION DURING THE CURRENT OR IMMEDIATE PRIOR FISCAL YEAR SHALL BE A MEMBER OF THE FEDERATION AN INDIVIDUAL MUST BE A MEMBER OF THE FEDERATION IN ORDER TO VOTE AT MEETINGS, TO SERVE ON THE BOARD OF DIRECTORS, OR SERVE AS A CHAIR OF A FEDERATION COMMITTEE ALL MATTERS PROPERLY PRESENTED AT A MEETING SHALL BE DECIDED BY A MAJORITY OF MEMBERS PRESENT AND VOTING UNLESS OTHERWISE DIRECTED BY THE LAWS OF THE STATE OF FLORIDA, THE ARTICLES OF INCORPORATION OR THE BY-LAWS

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section A, line 7a	ACCORDING TO THE ORGANIZATION'S BY-LAWS, A DONOR WHO HAS MADE A CONTRIBUTION TO THE FEDERATION DURING THE CURRENT OR IMMEDIATE PRIOR FISCAL YEAR SHALL BE A MEMBER OF THE FEDERATION AN INDIVIDUAL MUST BE A MEMBER OF THE FEDERATION IN ORDER TO VOTE AT MEETINGS, TO SERVE ON THE BOARD OF DIRECTORS, OR SERVE AS A CHAIR OF A FEDERATION COMMITTEE ALL MATTERS PROPERLY PRESENTED AT A MEETING SHALL BE DECIDED BY A MAJORITY OF MEMBERS PRESENT AND VOTING UNLESS OTHERWISE DIRECTED BY THE LAWS OF THE STATE OF FLORIDA, THE ARTICLES OF INCORPORATION OR THE BY-LAWS

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 11b	The Jewish Federation of Sarasota-Manatee posts the completed 990 draft on-line and sends a notice to the Board members when it is available for their review

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 12c	All Jewish Federation of Sarasota-Manatee, Inc (Federation) Board members and staff sign a conflict of interest policy ANNUALLY Also Federation distributed Ethical Guidelines policy to its Board

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section B, line 15	The Executive Director has a contract that was re-negotiated in 4/2016 The personnel committee reviewed salary structures for similar positions with Jewish Federation of North America, an umbrella organization for North America federations The final contract for this position is approved by the Board This contract is maintained in permanent personnel file on premises

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part VI, Section C, line 19	The organization makes its governing documents and conflict of interest policy available to the public upon request, the organization makes its financial statements available to the public upon request

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XI, line 9	CHANGE IN SPLIT INTEREST AGREEMENTS -11,039

990 Schedule O, Supplemental Information

Return Reference	Explanation
Form 990, Part XII, Line 2c Audit review process	THERE HAS BEEN NO CHANGE TO AUDIT OVERSITE OR SELECTION PROCESS DURING THE YEAR