

**AMERICAN FRIENDS OF ALYN HOSPITAL
QUARTERLY EXECUTIVE DIRECTOR STATUS REPORT**

As of 9/15/2024

KEY:
Good Progress
In Development
Issues
Stable

ITEMS IDENTIFIED THROUGH "ACTION PLAN" PROCESS					
PROGRAM/ACTIVITY	CATEGORY	STATUS	DEADLINE	RESULTS TO DATE	NOTES
Direct mail	Annual campaign	Good progress	Passover, High Holidays, End of Year	Passover DM has raised \$79,430 from 335 donors to date.	High Holiday direct mail appeal has been completed and is at the printer. It will be mailed out prior to the end of September and will serve as the launch for recognizing 90 years of American Friends of ALYN Hospital.
Wheels of Love	Annual campaign	Stable	September 20, 2024 (relative to "pivot")	November 11-14, 2024 Currently 75 riders have signed up from the USA to participate.	Reaching out to riders to confirm their participation in the ride in Israel. Also reaching out to past riders to determine their level of interest, and commitment, to a possible USA alternative (pivot) ride in November 2024. We have previously reached out to riders to ask them to contact "their" donors on behalf of ALYN. Only heard back from 7 who said they would.
Wheels of Love USA	Annual campaign	Issues	End of 2024	Due to heat warnings, we were not able to hold the ride this year. While we looked into alternative dates, there were none that worked relative to the ride location.	We need to explore possible changes for this ride in the future. Items to be considered should include: Timing, locations other than the NorthEast, building on ways to broaden the level of participation, etc.
Create an annual giving mindset and orientation so as to increase our capacity to secure the ongoing financial needs of the hospital.	Annual Campaign	Good progress	Ongoing	In the process of creating a comprehensive "case for giving" which will highlight the reasons to support the hospital on a consistent basis. Have tried to reach out to past riders to help in contacting donors so that solicitations are done on a more personalized basis.	Will be building on the "case for giving" so that we have more extensive information that can be used in our relationship building discussions with donors and foundation leadership.
Donor cultivation and appreciation	Annual campaign	stable	Ongoing	Personalize all receipts for donations over \$1,000. Call donors of \$1,000 or more on a weekly basis.	Requires us to make sure we are entering donations, processing checks, upload data from Stripe (processor of donations for WOL, WOL: USA and those made in USD directly through ALYN website). To be most effective at this, we need to maintain the database which includes updating records and entering contacts attempted/made. We are also looking into ways to improve the processing of donor receipts in an automated fashion within our database.
Wealth analysis	Annual campaign & Legacy	Defer	TBD		Need to do further work with Raisers Edge to see what is available through our existing contract.
Meet with donors and prospects in targeted communities Starting in November 2024, establish a goal of at least six community visits/year	Annual Campaign and Legacy Support	In development	November 2024 for first community visit	Have reached out to donors and prospects in the NY area, NJ, CT, LA, Florida, Chicago and Philadelphia to try and coordinate visits to those areas. Have held some successful meetings in the NY area but have not been able to finalize timing for visits in any of the other areas.	Seek board member input on additional people to contact in each targeted community. Working to develop a report in Raisers Edge to track and measure the impact in this area. This involves some data entry and training for staff to understand how to be using the system.
Committee with a direct link to the board including one more board members	Next generation	issues	February 2025	We are no longer able to utilize the people who were going to help lead this effort. One has made aliyah and others have needed to back away from being involved in this.	We need to identify people who can help us with this role.

Social evening to learn about the hospital and engage in some sort of social activity (possibly to benefit the hospital's patients-like a "paint your own....")	Next generation	in development	February 2025	We held three events and then the person who was helping coordinate these made aliyah.	We need to identify people who can help lead this effort. Also use Zoom as a way to create interactive/fun events with subject matter experts (like "cooking with____, off season bike training, etc.). Need to identify potential "experts" to speak at these programs.
Expand "Engage with ALYN" STEM program	Outreach and engagement & Next generation	Stable	Spring of each year for the following year	Milken High School and SAR will be new schools for 2024-2025. This is in addition to Hillel Day School in Detroit and Schechter in Bergen County who will continue in the program.	Will reach out to schools in our target communities to join the program. Program was more limited due to the war in Israel. Working to build/expand on the connections among the schools so they can benefit from each other. Also looking to bring outside resources into the program (local professionals) who can supplement the feedback process for the students. Also will be exploring the possibility of non day school participation in our target communities (i.e. synagogue religious schools and/or supplemental schools).
Bricks of Love/Mitzvah of Love Peer to peer fundraising opportunities through things like Mitzvah of Love, birthdays, other lifecycle events	Annual campaign	Stable	Ongoing	People continue to reach out to us to recognize certain key events/milestones.	Nominal promotion other than on our website and through personal discussions. Need to identify the best ways to promote this as a supplemental source of fundraising.
Phone calls, text, social media, email. Utilize local and national general events like Giving Tuesday, Write a Will Month, etc to encourage support	Annual campaign	In development	November 2024	Develop plan to incorporate some of these methodologies in our end of year fundraising efforts.	
Parlor meetings and events for people we have connections with already and for prospects.	Annual campaign	Issues	December 2024	Wheels of Love related gathering to be held on September 22, 2024.	Identify potential parlor meeting options as we solidify dates for visit in various targeted communities.
Reengage lapsed/past donors	Annual campaign	In development	November 2024		Create list of higher level past donors to contact starting after WOL.
Create initiatives to encourage recurring donations	Annual campaign	In development	November 2024	Has been included in past direct mail appeals and in our broad based outreach.	Consider developing a "society" to recognize those who commit to recurring donations. Promote this once it has been developed.
Build connections with estate planning professionals at all levels including Jewish community foundations	Legacy support	In development	ongoing		Reach out during community outreach efforts. Ask Board to be involved in helping identify and introduce us.
Foundation outreach	Legacy support	Some progress	December 2024		Develop plan to begin building relationships with targeted foundations that have an interest in our work. Focus initial discussions on identifying ways in which we can help them.
Parents night at schools for participating STEM schools	Next generation & Outreach and engagement	Issues	January 2025		Not able to fully pursue this idea due to the war. Will discuss with the schools for the current school year.
Cocktails and Conversations targeted to new and/or younger prospects/donors	Next generation & Outreach and engagement	Issues	February 2025	We are no longer able to utilize the people who were going to help lead this effort. One has made aliyah and others have needed to back away from being involved in this.	We need to identify people who can help us with this role.

Meeting with Federation/Foundation, Rabbis	Outreach and engagement	Issues	Ongoing	Have reached out to the Federation directors in Philadelphia, Hartford, Princeton/Mercer Bucks, MetroWest NJ to schedule times to meet. Have reached out to a few Rabbis in NYC and NJ as well.	No responses yet from Federations. Traded contacts with two rabbis but have not been able to schedule yet.
Leverage our established connections with US hospitals	Outreach and engagement	Issues	Ongoing		Tied to outreach efforts in all communities.
Reframe donor report into annual report	Outreach and engagement	In development	January 2025		Develop an "annual report" to use as another way of conveying the ongoing needs and impact of the hospital.
Utilize articles written by ALYN staff in local media	Outreach and engagement	Stable	Ongoing		Will use as they are available
Analyze and, as needed, modify existing initiatives (newsletter, Align with ALYN, etc) for broader support	Outreach and engagement	In development	December 2024	We have postponed AWA due to the war. We have modified the newsletter to not only focus on services and events but have added an article from the Executive Director and stories featuring long term riders/volunteers.	Will address some of this through the overall marketing plan development. This will include a modified version of AWA with shorter topic focused content that can be highlighted in many locations/medium.
CLE courses for estate planning pros	Legacy support		Defer		Defer until have developed connections with key pros in field.
Where are they now "profiles" of former patients who have gone on to live a successful life	Outreach and engagement		Defer		Begin to build a database of information as we work with the hospital on marketing information.

ONGOING OPERATIONAL ITEMS					
PROGRAM/ACTIVITY	CATEGORY	STATUS		TIMING/RESULTS TO DATE	NOTES
2024 Audit	Administration	Completed	2025 to be completed by August 2025		
Financial Reports	Administration	stable	Monthly		As this is our first year using the "new" system, we will need to continue to adapt and make some adjustments to the reports to maximize their utilization in our ongoing efforts.
Transfers to Israel	Administration	Good progress	Monthly	Have begun a process which is intended to secure monthly transfer to Israel.	
Board and Executive Committee Meetings	Administration	Good progress	Quarterly	Implemented some changes relative to the ongoing governance process. Changed the timing between Executive Committee and board meetings. Have focused on differentiating the agendas between the two types of meetings so as to maximize use of peoples time and efforts.	
Governance	Administration	Good progress	March 2025	Have identified some areas which need to be clarified/addressed to insure consistency throughout the process of identifying, recruiting and electing board and executive committee members.	First committee meeting held August 26, 2024
Finance Committee	Administration	Good progress	Ongoing	Working to improve and streamline our efforts. Includes automating process of moving money from the restricted endowment into our unrestricted investment. Also developed recommendation for the handling of unrestricted bequests/legacy donations.	Meetings held in August and September
Development Committee	Administration	Good progress	Ongoing	Continuing to evaluate current initiatives as well as reviewing and discussing implementation of new initiatives to increase our annual fundraising success.	Meeting held August 22, 2024

Nominating Committee	Administration	In development	December 2024		Bring together a committee to review the transition of board and executive committee members as well as the identification and recruitment of new board members.
Staff management	Administration	Good progress	Ongoing	Hired new development associate who started September 9, 2024. Have implemented weekly staff meetings and other tools to maximize productivity and staff satisfaction.	
Staff utilization	Administration	In development	Ongoing	Through a number of the other items (like the transition in financial reporting), have begun to identify some areas in which we may be able to achieve greater efficiency and effectiveness among the staff and the work that needs to be completed on an ongoing basis.	
Israel Office	Administration	Good progress	Ongoing	Have developed improved communication and working relationships with many of the different staff/offices in Israel.	Additional work needs to be put into a few key departments in Israel (marketing, for example) in moving forward.
Technology upgrade		Good progress	December 2024	Putting in place everything needed to transition from a server based office environment to a cloud based environment. This will help with security and is being funded through a grant we received from New York state.	
Planning Strategically	Administration	Good progress	Ongoing	Successfully completed the development of an Action Plan to guide our efforts moving forward in 2024 and beyond.	