

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

As of 12/8/2024

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| KEY: |
| Good Progress |
| In Development |
| Issues |
| Stable |

| ITEMS IDENTIFIED THROUGH "ACTION PLAN" PROCESS | | | | | |
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| PROGRAM/ACTIVITY | CATEGORY | STATUS | DEADLINE | RESULTS LAST QUARTER | NOTES |
| Direct mail | Annual campaign | Good progress | Passover, High Holidays, End of Year | This year we have raised \$119,433 from 664 donors. | Year end direct mail appeal has been completed and is at the printer. It will be mailed out by December 17th and will be on the theme of "Hope, Healing, History and Hanukkah". |
| Wheels of Love | Annual campaign | 2024 Completed | | November 11-14, 2024 About 70 riders participated from the USA. \$1,725,938 raised. Prior to the ride, sent thank you notes to all USA riders who had raised over \$15,000 prior to the ride. Notes sent to everyone who participated on the ride thanking them for their participation and for the strong support they demonstrated to Israel. Also shared dates for WOL USA and next years ride. | Feedback on the ride was very good. A few suggestions we are considering for next year to increase participation is to reenergize the ambassador program and to explore strategies to recruit younger participants. Also consider "mentoring" program and hosting a happy hour the first night in Israel to help new riders connect with established riders. |
| Wheels of Love USA | Annual campaign | In development | March 2025 | Developing plans to hold the ride in late February in the Florida keys. | Likely to be two days/two nights. Also looking to hold a brunch event in South Florida for the non riding community to build/expand our base of supporters. |
| 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 | Completed, including printing, of the "case for giving" which will highlight the reasons to support the hospital on a consistent basis. Developing strategies on ways to maximize the use of this document. Will include social media and sending it to targeted donors/prospects. Also exploring ways to use this messaging to help riders in their fundraising for Wheels of Love in the future. | 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. |

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| Meet with donors and prospects in targeted communities Starting in 2025, establish a goal of at least six community visits/year | Annual Campaign and Legacy Support | In development | December 2025 | Participated in a panel presentation in Philadelphia sponsored by the Philadelphia Israel Chamber of Commerce through which I met a number of individuals who are interested in meeting to learn more about ALYN. Met a number of WOL riders who are open to helping expand awareness of ALYN in their community. | 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 | Defer | | | As we begin to sponsor/hold social programs with this target group, we will be able to identify people who can play a role in this area and then will develop it further. |
| Social events which provide an opportunity for us to expose participants to the work of the hospital | Next generation | In development | February 2025 | Reaching out to organizations in NYC, LA, Chicago, Boston, Austin to identify potential opportunities to sponsor young leadership events that will enable us to start building connections within this target group. | Have had a number of productive conversations and are looking to hold our first sponsored event in January 2025. Need to continue exploring ways to identify/connect with other potential partners in this area. 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 | | |
| 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 | Dramatically expanded our presence on Facebook, Instagram, and LinkedIn. Have developed a calendar to insure that we have (and maintain) a regular and active presence on each of the aforementioned platforms. | |
| Parlor meetings and events for people we have connections with already and for prospects. | Annual campaign | In development | December 2025 | Developing plans for an event in South Florida in conjunction with Wheels of Love USA (targeted to more of a general audience than the rides target). | Identify additional potential parlor meeting options as we solidify dates for visits in various targeted communities. |
| Reengage lapsed/past donors | Annual campaign | In development | Passover 2025 | | Planning to do a test within our direct mail campaign to target former donors to reinstate their support. |
| Create initiatives to encourage recurring donations | Annual campaign | Stable | Ongoing | 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 | June 2025 | Reviewing available resources to help us target key foundations with the potential interest in supporting our efforts. | As foundations are identified we will begin building relationships with key people within each foundation. |

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| Parents night at schools for participating STEM schools | Next generation & Outreach and engagement | Good progress | June 2025 | Conversations have been held with the participating schools about us sponsoring a program for parents through which we can expose them to ALYN based on their children's experience with this program. | |
| 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 | Stable | Ongoing | Newsletter has been going out consistently the middle of each month. Have featured an introductory article from the executive director, volunteer stories, stories highlighting events at AFAH or ALYN, patients served, etc. Regularly feature each story on our social media platforms as well. | Try to develop a tool to evaluate the response to our newsletter stories (although we get feedback that people like it) and the overall format so that we can improve as needed. |
| 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 | | | | | |
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| 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 | Stable | Quarterly | Continue to differentiate the agendas so that we maximize the input and effectiveness of people at each meeting. | |
| Governance | Administration | Good progress | May 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. | Next meeting to be held December 19th, 2024. |
| Finance Committee | Administration | Good progress | Ongoing | Have effectively implement process to automate the transfer of funds from the endowment to the unrestricted investment account. | Next meeting to be held December 17th, 2024. Will be developing suggestions on the investment strategies for the unrestricted investment and how we should be using the funds in this account. |
| Development Committee | Administration | Good progress | Ongoing | | Next meeting to be held in January 2025. |

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| Nominating Committee | Administration | In development | May 2025 | | 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 | Stable | Ongoing | | |
| 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. | |
| Technology upgrade | | Good progress | December 2025 | Have converted from a local server to having our data in "the cloud". | In the process of enhancing our internet service to improve performance of our system. |
| Planning Strategically | Administration | Good progress | Ongoing | Continue to regularly review this "plan" which is the primary basis of this update. | Continue to develop/refine the plan through the work of each of our major committees. |