

**ORT AMERICA, INC. - PROJECT PROGRESS REPORT**  
**CALENDAR YEAR 2019 - FOR THE SEVEN MONTH PERIOD ENDING JULY 31, 2019**

A	B	C	D	E	F	G	H	I	J	K
2019								2018	2019 vs. 2018	
Annual Goal	Month of July		Year to Date					*3 YTD Actual	YTD Actuals - Variance	
	*1 Goal	Actual	*1 Goal	*2 Actual	Goal vs Actual	YTD GvA Variance %	Planned Giving		Amount	%
					Favorable (Unfavorable)				Favorable (Unfavorable)	

**NATIONAL SUMMARY**

<b>MAJOR METROPOLITAN AREAS</b>	4,350,000	250,555	183,879	1,686,891	1,892,220	205,328	12.2%	102,993	1,572,177	320,043	20.4%
<b>FLORIDA</b>	900,000	51,839	14,903	349,012	275,421	(73,591)	-21.1%	364,412	212,561	62,859	29.6%
<b>CALIFORNIA</b>	790,000	45,503	15,247	306,355	112,961	(193,394)	-63.1%	1,120,374	125,827	(12,866)	-10.2%
<b>NORTHEAST</b>	1,095,000	63,071	118,499	424,631	556,725	132,093	31.1%	1,069,562	330,973	225,751	68.2%
<b>TRADES &amp; INDUSTRIES</b>	50,000	2,880	100	19,390	3,014	(16,376)	-84.5%	0	5,953	(2,939)	-49.4%
<b>NATIONAL &amp; AT-LARGE</b>	415,000	23,903	39,405	160,933	91,372	(69,562)	-43.2%	34,094	76,713	14,659	19.1%
<b>TOTAL</b>	<u>7,600,000</u>	<u>437,751</u>	<u>372,032</u>	<u>2,947,212</u>	<u>2,931,711</u>	<u>(15,502)</u>	<u>-0.5%</u>	<u>2,691,436</u>	<u>2,324,203</u>	<u>607,507</u>	<u>26.1%</u>

**A** = Annual Goal for Area

\*1 **B** = Budgeted Monthly Goal for Area

**C** = Actual Monthly Fundraising Total for Area

\*1 **D** = Budgeted YTD Goal for Area

**E** = Actual YTD Fundraising Total for Area (Current)

**F** = Budgeted YTD Goal minus Actual YTD Fundraising

**G** = % Variance in YTD Goal vs. YTD Fundraising

**H** = Actual YTD Planned Giving Total (CGA's + Legacy) for Area (Current)

**I** = Actual YTD Fundraising Total for Area (Prior)

**J** = Actual YTD Fundraising (Current) minus Actual YTD Fundraising (Prior)

**K** = % Variance in YTD Fundraising (Current) vs. YTD Fundraising (Prior)

\*1 Budgeted Monthly and YTD Goals are based on three year National averages from Calendar Years 2016 to 2018

\*2 For 2019 YTD, OA had raised \$1,449,401.72 (49.44%) Unrestricted vs. \$1,482,309.10 (50.56%) Restricted revenues.

\*3 For 2018 YTD, OA had raised \$1,009,524.08 (43.44%) Unrestricted vs. \$1,314,678.46 (56.56%) Restricted revenues.

**The financials represented in this report are unaudited. As a result, they are subject to change.**

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**MAJOR METROPOLITAN AREAS**

<b>ATLANTA</b>	510,000	29,375	13,963	197,773	50,271	(147,502)	-74.6%	0	116,260	(65,989)	-56.8%
<b>OHIO</b>	515,000	29,663	14,754	199,712	139,958	(59,755)	-29.9%	10,841	190,871	(50,913)	-26.7%
<b>CHICAGO</b>	1,200,000	69,119	44,786	465,349	378,344	(87,005)	-18.7%	92,153	331,801	46,543	14.0%
<b>MICHIGAN</b>	2,105,000	121,245	110,376	816,300	1,323,225	506,924	62.1%	0	932,540	390,684	41.9%
<b>ANN ARBOR</b>	20,000	1,152	0	7,756	422	(7,334)	-94.6%	0	705	(283)	-40.1%
<b>TOTALS</b>	<u>4,350,000</u>	<u>250,555</u>	<u>183,879</u>	<u>1,686,891</u>	<u>1,892,220</u>	<u>205,328</u>	<u>12.2%</u>	<u>102,993</u>	<u>1,572,177</u>	<u>320,043</u>	<u>20.4%</u>

**FLORIDA**

<b>GREATER MIAMI</b>	3,000	173	200	1,163	436	(727)	-62.5%	2,025	430	6	1.4%
<b>SARASOTA MANATEE</b>	60,000	3,456	252	23,267	8,684	(14,583)	-62.7%	30,000	18,371	(9,687)	-52.7%
<b>NORTH BROWARD</b>	55,000	3,168	1,230	21,329	9,604	(11,725)	-55.0%	9,338	12,744	(3,140)	-24.6%
<b>PALM BEACH</b>	585,000	33,695	3,810	226,858	168,091	(58,767)	-25.9%	109,745	153,086	15,006	9.8%
<b>SOUTH BROWARD</b>	25,000	1,440	100	9,695	3,780	(5,915)	-61.0%	9,138	2,939	841	28.6%
<b>MEMBER-AT-LARGE</b>	137,000	7,891	7,589	53,127	66,142	13,015	24.5%	204,167	6,188	59,955	968.9%
<b>PALMWARD EVENING</b>	35,000	2,016	1,722	13,573	18,683	5,110	37.7%	0	18,804	(121)	-0.6%
<b>TOTALS</b>	<u>900,000</u>	<u>51,839</u>	<u>14,903</u>	<u>349,012</u>	<u>275,421</u>	<u>(73,591)</u>	<u>-21.1%</u>	<u>364,412</u>	<u>212,561</u>	<u>62,859</u>	<u>29.6%</u>

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**CALIFORNIA**

<b>GREATER LOS ANGELES</b>	25,000	1,440	180	9,695	3,059	(6,636)	-68.4%	646,150	2,810	249	8.9%
<b>LOS ANGELES COMMITTEE</b>	275,000	15,840	1,536	106,643	10,189	(96,454)	-90.4%	0	6,408	3,781	59.0%
<b>SO. CAL VALLEY / VENTURA</b>	40,000	2,304	1,015	15,512	10,187	(5,324)	-34.3%	28,778	23,116	(12,928)	-55.9%
<b>FULLERTON / NO. ORANGE</b>	20,000	1,152	43	7,756	4,528	(3,228)	-41.6%	0	10,200	(5,672)	-55.6%
<b>LAGUNA WOODS</b>	20,000	1,152	72	7,756	4,356	(3,400)	-43.8%	539	8,003	(3,647)	-45.6%
<b>MEMBER-AT-LARGE</b>	50,000	2,880	1,022	19,390	10,707	(8,682)	-44.8%	28,613	6,316	4,391	69.5%
<b>NORTH COUNTY SHORES</b>	10,000	576	86	3,878	3,359	(519)	-13.4%	0	3,930	(571)	-14.5%
<b>SAN MARINO</b>	40,000	2,304	136	15,512	31,232	15,720	101.3%	37,875	30,561	671	2.2%
<b>SOUTH BAY</b>	20,000	1,152	100	7,756	672	(7,084)	-91.3%	0	916	(244)	-26.6%
<b>SOUTH COUNTY</b>	40,000	2,304	150	15,512	3,822	(11,690)	-75.4%	178,120	3,657	165	4.5%
<b>SUB TOTAL</b>	540,000	31,103	4,340	209,407	82,112	(127,296)	-60.8%	920,075	95,917	(13,805)	-14.4%
<b>SAN FRANCISCO / BAY AREA</b>											
<b>EL CAMINO</b>	40,000	2,304	10,510	15,512	14,258	(1,254)	-8.1%	0	7,326	6,932	94.6%
<b>MARIN</b>	110,000	6,336	272	42,657	11,874	(30,783)	-72.2%	299	14,385	(2,511)	-17.5%
<b>MEMBER-AT-LARGE</b>	30,000	1,728	125	11,634	3,192	(8,442)	-72.6%	100,000	2,763	429	15.5%
<b>ROSSMOOR</b>	22,000	1,267	0	8,531	1,028	(7,503)	-88.0%	100,000	5,048	(4,020)	-79.6%
<b>SAN FRANCISCO</b>	38,000	2,189	0	14,736	36	(14,700)	-99.8%	0	72	(36)	-50.0%
<b>SILICON VALLEY</b>	10,000	576	0	3,878	461	(3,417)	-88.1%	0	316	145	45.9%
<b>SUB TOTAL</b>	250,000	14,400	10,907	96,948	30,849	(66,099)	-68.2%	200,299	29,910	939	3.1%
<b>TOTALS</b>	<u>790,000</u>	<u>45,503</u>	<u>15,247</u>	<u>306,355</u>	<u>112,961</u>	<u>(193,394)</u>	<u>-63.1%</u>	<u>1,120,374</u>	<u>125,827</u>	<u>(12,866)</u>	<u>-10.23%</u>



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**NORTHEAST**

<b>EASTERN MASSACHUSETTS</b>	100,000	5,760	31,242	38,779	145,477	106,698	275.1%	7,400	4,639	140,838	3036.0%
<b>NEW JERSEY</b>	250,000	14,400	29,607	96,948	68,607	(28,341)	-29.2%	3,000	92,003	(23,396)	-25.4%
<b>OCEANVIEW</b>	15,000	864	1,224	5,817	3,221	(2,596)	-44.6%	0	4,456	(1,235)	-27.7%
<b>CENTRAL CONNECTICUT</b>	7,500	432	0	2,908	408	(2,500)	-86.0%	0	734	(326)	-44.4%
<b>GREATER HARTFORD</b>	2,500	144	0	969	1,115	146	15.0%	0	1,344	(229)	-17.0%
<b>JULIE KOVAR</b>	2,500	144	18	969	583	(386)	-39.9%	0	248	335	135.1%
<b>STAMFORD RIPPOWAN</b>	1,600	92	0	620	136	(484)	-78.1%	0	25	111	444.0%
<b>LONG ISLAND</b>	100,000	5,760	414	38,779	34,190	(4,589)	-11.8%	0	53,787	(19,597)	-36.4%
<b>WESTCHESTER</b>	50,000	2,880	1,000	19,390	5,193	(14,197)	-73.2%	0	9,596	(4,403)	-45.9%
<b>SUFFERN</b>	16,000	922	0	6,205	172	(6,033)	-97.2%	0	4,522	(4,350)	-96.2%
<b>BROOKLYN-AT-LARGE</b>	27,500	1,584	0	10,664	35,956	25,291	237.2%	0	5,036	30,920	614.0%
<b>GREATER WASHINGTON</b>	100,000	5,760	2,062	38,779	11,150	(27,629)	-71.2%	0	18,209	(7,059)	-38.8%
<b>MEMBER-AT-LARGE</b>	298,700	17,205	36,147	115,833	205,909	90,076	77.8%	1,059,162	88,238	117,671	133.4%
<b>NORFOLK</b>	1,200	69	36	465	774	309	66.3%	0	9,099	(8,325)	-91.5%
<b>DELAWARE VALLEY</b>											
<b>BRANDYWINE</b>	1,000	58	0	388	54	(334)	-86.1%	0	69	(15)	-21.7%
<b>MAIN LINE</b>	10,000	576	100	3,878	350	(3,528)	-91.0%	0	810	(460)	-56.8%
<b>MARPLE</b>	13,000	749	0	5,041	3,226	(1,815)	-36.0%	0	8,819	(5,593)	-63.4%
<b>PHILADELPHIA</b>	75,000	4,320	15,645	29,084	34,659	5,574	19.2%	0	25,783	8,876	34.4%
<b>SOUTH JERSEY</b>	1,000	58	0	388	125	(263)	-67.8%	0	280	(155)	-55.4%
<b>VALLEY FORGE</b>	22,500	1,296	1,004	8,725	5,420	(3,305)	-37.9%	0	3,275	2,145	65.5%
<b>SUB TOTAL</b>	122,500	7,056	16,749	47,504	43,834	(3,671)	-7.7%	0	39,036	4,798	12.3%
<b>TOTALS</b>	<u>1,095,000</u>	<u>63,071</u>	<u>118,499</u>	<u>424,631</u>	<u>556,725</u>	<u>132,093</u>	<u>31.1%</u>	<u>1,069,562</u>	<u>330,973</u>	<u>225,751</u>	<u>68.2%</u>

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**TRADES & INDUSTRIES**

AAFS	35,000	2,016	0	13,573	0	(13,573)	-100.0%	0	360	(360)	-100.0%
ENGINEERING	5,000	288	0	1,939	2,000	61	3.1%	0	2,205	(205)	-9.3%
JEWELRY	1,000	58	0	388	0	(388)	-100.0%	0	0	0	0.0%
REAL ESTATE	5,000	288	0	1,939	410	(1,529)	-78.9%	0	2,710	(2,300)	-84.9%
INVESTMENT & FINANCE	2,000	115	0	776	250	(526)	-67.8%	0	250	0	0.0%
WORKMEN'S CIRCLE	2,000	115	100	776	354	(422)	-54.4%	0	428	(74)	-17.3%
<b>TOTALS</b>	<u>50,000</u>	<u>2,880</u>	<u>100</u>	<u>19,390</u>	<u>3,014</u>	<u>(16,376)</u>	<u>-84.5%</u>	<u>0</u>	<u>5,953</u>	<u>(2,939)</u>	<u>-49.4%</u>

**NATIONAL & AT-LARGE**

CACTUS	7,500	432	5,236	2,908	6,832	3,924	134.9%	0	7,271	(439)	-6.0%
DENVER	3,300	190	0	1,280	1,843	563	44.0%	0	279	1,564	560.6%
MEMBER-AT-LARGE	333,200	19,192	28,791	129,212	54,670	(74,542)	-57.7%	34,094	47,742	6,929	14.5%
NEXT GENERATION NY	45,000	2,592	5,378	17,451	27,676	10,226	58.6%	0	12,632	15,045	119.1%
SAN ANTONIO / ALAMO	1,000	58	0	388	350	(38)	-9.7%	0	5,290	(4,940)	-93.4%
FOUNDATIONS	25,000	1,440	0	9,695	0	(9,695)	-100.0%	0	3,500	(3,500)	-100.0%
<b>TOTALS</b>	<u>415,000</u>	<u>23,903</u>	<u>39,405</u>	<u>160,933</u>	<u>91,372</u>	<u>(69,562)</u>	<u>-43.2%</u>	<u>34,094</u>	<u>76,713</u>	<u>14,659</u>	<u>19.1%</u>