

ORT AMERICA, INC. - PROJECT PROGRESS REPORT
CALENDAR YEAR 2019 - FOR THE EIGHT MONTH PERIOD ENDING AUGUST 31, 2019

A	B	C	D	E	F	G	H	I	J	K
2019								2018	2019 vs. 2018	
Annual Goal	Month of August		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

MAJOR METROPOLITAN AREAS	4,350,000	235,795	129,228	1,922,687	2,021,447	98,761	5.1%	135,311	1,875,026	146,421	7.8%
FLORIDA	900,000	48,785	22,258	397,797	297,679	(100,119)	-25.2%	374,412	223,875	73,804	33.0%
CALIFORNIA	790,000	42,823	29,399	349,178	142,359	(206,818)	-59.2%	1,319,482	133,926	8,434	6.3%
NORTHEAST	1,095,000	59,355	56,813	483,987	613,537	129,551	26.8%	1,069,562	393,724	219,813	55.8%
TRADES & INDUSTRIES	50,000	2,710	430	22,100	3,444	(18,656)	-84.4%	0	6,203	(2,759)	-44.5%
NATIONAL & AT-LARGE	415,000	22,495	5,519	183,429	96,891	(86,538)	-47.2%	34,094	106,897	(10,006)	-9.4%
TOTAL	<u>7,600,000</u>	<u>411,964</u>	<u>243,646</u>	<u>3,359,177</u>	<u>3,175,357</u>	<u>(183,820)</u>	<u>-5.5%</u>	<u>2,932,861</u>	<u>2,739,651</u>	<u>435,706</u>	<u>15.9%</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 \$1,589,478.18 (50.06%) Unrestricted vs. \$1,585,878.84 (49.94%) Restricted revenues.

*3 For 2018 YTD, OA had raised \$1,214,616.10 (44.33%) Unrestricted vs. \$1,525,034.43 (55.67%) 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

ATLANTA	510,000	27,645	15,868	225,418	66,139	(159,279)	-70.7%	0	187,847	(121,708)	-64.8%
OHIO	515,000	27,916	25,002	227,628	164,960	(62,669)	-27.5%	10,841	231,200	(66,240)	-28.7%
CHICAGO	1,200,000	65,047	22,059	530,396	400,403	(129,994)	-24.5%	124,471	392,965	7,438	1.9%
MICHIGAN	2,105,000	114,103	66,101	930,404	1,389,326	458,923	49.3%	0	1,062,310	327,016	30.8%
ANN ARBOR	20,000	1,084	198	8,840	620	(8,220)	-93.0%	0	705	(85)	-12.1%
TOTALS	<u>4,350,000</u>	<u>235,795</u>	<u>129,228</u>	<u>1,922,687</u>	<u>2,021,447</u>	<u>98,761</u>	<u>5.1%</u>	<u>135,311</u>	<u>1,875,026</u>	<u>146,421</u>	<u>7.8%</u>

FLORIDA

GREATER MIAMI	3,000	163	72	1,326	508	(818)	-61.7%	2,025	630	(122)	-19.4%
SARASOTA MANATEE	60,000	3,252	432	26,520	9,116	(17,404)	-65.6%	40,000	19,998	(10,882)	-54.4%
NORTH BROWARD	55,000	2,981	180	24,310	9,784	(14,526)	-59.8%	9,338	13,866	(4,082)	-29.4%
PALM BEACH	585,000	31,710	17,442	258,568	185,533	(73,035)	-28.2%	109,745	158,723	26,811	16.9%
SOUTH BROWARD	25,000	1,355	299	11,050	4,079	(6,971)	-63.1%	9,138	4,439	(360)	-8.1%
MEMBER-AT-LARGE	137,000	7,426	545	60,554	66,687	6,134	10.1%	204,167	7,379	59,308	803.7%
PALMWARD EVENING	35,000	1,897	3,288	15,470	21,971	6,501	42.0%	0	18,840	3,131	16.6%
TOTALS	<u>900,000</u>	<u>48,785</u>	<u>22,258</u>	<u>397,797</u>	<u>297,679</u>	<u>(100,119)</u>	<u>-25.2%</u>	<u>374,412</u>	<u>223,875</u>	<u>73,804</u>	<u>33.0%</u>

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CALIFORNIA

GREATER LOS ANGELES	25,000	1,355	0	11,050	3,059	(7,991)	-72.3%	646,150	2,810	249	8.9%
LOS ANGELES COMMITTEE	275,000	14,907	1,020	121,549	11,209	(110,340)	-90.8%	0	6,616	4,593	69.4%
SO. CAL VALLEY / VENTURA	40,000	2,168	10,151	17,680	20,338	2,658	15.0%	28,778	25,944	(5,605)	-21.6%
FULLERTON / NO. ORANGE	20,000	1,084	7,043	8,840	11,571	2,731	30.9%	0	10,218	1,353	13.2%
LAGUNA WOODS	20,000	1,084	3,433	8,840	7,789	(1,051)	-11.9%	539	8,039	(250)	-3.1%
MEMBER-AT-LARGE	50,000	2,710	374	22,100	11,081	(11,019)	-49.9%	28,613	7,270	3,811	52.4%
NORTH COUNTY SHORES	10,000	542	0	4,420	3,359	(1,061)	-24.0%	0	3,966	(607)	-15.3%
SAN MARINO	40,000	2,168	0	17,680	31,232	13,552	76.7%	37,875	31,561	(329)	-1.0%
SOUTH BAY	20,000	1,084	54	8,840	726	(8,114)	-91.8%	0	1,152	(426)	-37.0%
SOUTH COUNTY	40,000	2,168	72	17,680	3,894	(13,786)	-78.0%	367,227	3,657	237	6.5%
SUB TOTAL	540,000	29,271	22,147	238,678	104,259	(134,420)	-56.3%	1,109,183	101,233	3,026	3.0%
SAN FRANCISCO / BAY AREA											
EL CAMINO	40,000	2,168	197	17,680	14,455	(3,225)	-18.2%	0	9,289	5,166	55.6%
MARIN	110,000	5,963	0	48,620	11,874	(36,746)	-75.6%	299	15,085	(3,211)	-21.3%
MEMBER-AT-LARGE	30,000	1,626	118	13,260	3,310	(9,950)	-75.0%	110,000	2,811	499	17.8%
ROSSMOOR	22,000	1,193	6,937	9,724	7,965	(1,759)	-18.1%	100,000	5,120	2,845	55.6%
SAN FRANCISCO	38,000	2,060	0	16,796	36	(16,760)	-99.8%	0	72	(36)	-50.0%
SILICON VALLEY	10,000	542	0	4,420	461	(3,959)	-89.6%	0	316	145	45.9%
SUB TOTAL	250,000	13,551	7,252	110,499	38,101	(72,399)	-65.5%	210,299	32,693	5,408	16.5%
TOTALS	<u>790,000</u>	<u>42,823</u>	<u>29,399</u>	<u>349,178</u>	<u>142,359</u>	<u>(206,818)</u>	<u>-59.2%</u>	<u>1,319,482</u>	<u>133,926</u>	<u>8,434</u>	<u>6.30%</u>

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NORTHEAST

EASTERN MASSACHUSETTS	100,000	5,421	5,578	44,200	151,055	106,855	241.8%	7,400	30,127	120,928	401.4%
NEW JERSEY	250,000	13,551	3,120	110,499	71,727	(38,772)	-35.1%	3,000	96,511	(24,784)	-25.7%
OCEANVIEW	15,000	813	100	6,630	3,321	(3,309)	-49.9%	0	5,556	(2,235)	-40.2%
CENTRAL CONNECTICUT	7,500	407	0	3,315	408	(2,907)	-87.7%	0	820	(412)	-50.2%
GREATER HARTFORD	2,500	136	0	1,105	1,115	10	0.9%	0	1,344	(229)	-17.0%
JULIE KOVAR	2,500	136	54	1,105	637	(468)	-42.4%	0	248	389	156.9%
STAMFORD RIPPWAN	1,600	87	0	707	136	(571)	-80.8%	0	25	111	444.0%
LONG ISLAND	100,000	5,421	1,558	44,200	35,748	(8,452)	-19.1%	0	54,013	(18,265)	-33.8%
WESTCHESTER	50,000	2,710	53	22,100	5,246	(16,854)	-76.3%	0	10,596	(5,350)	-50.5%
SUFFERN	16,000	867	1,500	7,072	1,672	(5,400)	-76.4%	0	6,135	(4,463)	-72.7%
BROOKLYN-AT-LARGE	27,500	1,491	0	12,155	35,956	23,801	195.8%	0	5,090	30,866	606.4%
GREATER WASHINGTON	100,000	5,421	1,104	44,200	12,254	(31,946)	-72.3%	0	25,739	(13,485)	-52.4%
MEMBER-AT-LARGE	298,700	16,191	41,974	132,024	247,883	115,858	87.8%	1,059,162	105,688	142,195	134.5%
NORFOLK	1,200	65	108	530	882	352	66.3%	0	9,153	(8,271)	-90.4%
DELAWARE VALLEY											
BRANDYWINE	1,000	54	0	442	54	(388)	-87.8%	0	69	(15)	-21.7%
MAIN LINE	10,000	542	1,154	4,420	1,504	(2,916)	-66.0%	0	1,810	(306)	-16.9%
MARPLE	13,000	705	0	5,746	3,226	(2,520)	-43.9%	0	9,035	(5,809)	-64.3%
PHILADELPHIA	75,000	4,065	10	33,150	34,669	1,519	4.6%	0	27,473	7,196	26.2%
SOUTH JERSEY	1,000	54	0	442	125	(317)	-71.7%	0	280	(155)	-55.4%
VALLEY FORGE	22,500	1,220	500	9,945	5,920	(4,025)	-40.5%	0	4,011	1,909	47.6%
SUB TOTAL	122,500	6,640	1,664	54,145	45,498	(8,647)	-16.0%	0	42,678	2,820	6.6%
TOTALS	<u>1,095,000</u>	<u>59,355</u>	<u>56,813</u>	<u>483,987</u>	<u>613,537</u>	<u>129,551</u>	<u>26.8%</u>	<u>1,069,562</u>	<u>393,724</u>	<u>219,813</u>	<u>55.8%</u>

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TRADES & INDUSTRIES

AAFS	35,000	1,897	250	15,470	250	(15,220)	-98.4%	0	610	(360)	-59.0%
ENGINEERING	5,000	271	180	2,210	2,180	(30)	-1.4%	0	2,205	(25)	-1.1%
JEWELRY	1,000	54	0	442	0	(442)	-100.0%	0	0	0	0.0%
REAL ESTATE	5,000	271	0	2,210	410	(1,800)	-81.4%	0	2,710	(2,300)	-84.9%
INVESTMENT & FINANCE	2,000	108	0	884	250	(634)	-71.7%	0	250	0	0.0%
WORKMEN'S CIRCLE	2,000	108	0	884	354	(530)	-60.0%	0	428	(74)	-17.3%
TOTALS	<u>50,000</u>	<u>2,710</u>	<u>430</u>	<u>22,100</u>	<u>3,444</u>	<u>(18,656)</u>	<u>-84.4%</u>	<u>0</u>	<u>6,203</u>	<u>(2,759)</u>	<u>-44.5%</u>

NATIONAL & AT-LARGE

CACTUS	7,500	407	108	3,315	6,940	3,625	109.4%	0	7,271	(331)	-4.5%
DENVER	3,300	179	0	1,459	1,843	384	26.4%	0	293	1,550	529.0%
MEMBER-AT-LARGE	333,200	18,061	1,871	147,273	56,541	(90,732)	-61.6%	34,094	74,935	(18,393)	-24.5%
NEXT GENERATION NY	45,000	2,439	3,540	19,890	31,216	11,326	56.9%	0	15,609	15,608	100.0%
SAN ANTONIO / ALAMO	1,000	54	0	442	350	(92)	-20.8%	0	5,290	(4,940)	-93.4%
FOUNDATIONS	25,000	1,355	0	11,050	0	(11,050)	-100.0%	0	3,500	(3,500)	-100.0%
TOTALS	<u>415,000</u>	<u>22,495</u>	<u>5,519</u>	<u>183,429</u>	<u>96,891</u>	<u>(86,538)</u>	<u>-47.2%</u>	<u>34,094</u>	<u>106,897</u>	<u>(10,006)</u>	<u>-9.4%</u>