



COMMUNITY HOMES FOR ADULTS, INC.

2022-2023

# Annual Report

For the year ended October 31, 2023

A review of the yearlong celebration  
of CHAI's 40th Anniversary.

[www.chaidallas.com](http://www.chaidallas.com)





# OUR MISSION

CHAI's mission is to enable adults with intellectual disabilities to live **full, rich, safe** lives with **meaningful community participation**.



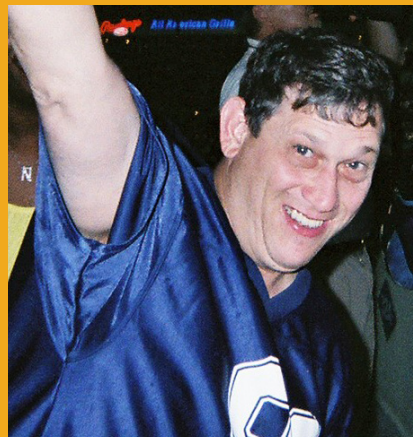
Our mission guides us to tirelessly work to create the most independent and healthy lives for our residents and clients. Our community's commitment to care for all of its members allows CHAI to pursue our mission year after year.





# CELEBRATING OUR HISTORY

Throughout 2023, we celebrated CHAI's 40th Anniversary by honoring our past and supporting our future. We reflected on CHAI's growth from one group home for four residents to nine group homes for 31 residents. CHAI's impact has grown since our founding, in 1983, to reach more residents, more families, and the community at large.



# A MESSAGE FROM THE BOARD PRESIDENT AND CEO

## Dear CHAI Community:

2023 was the year of the strategic plan for CHAI. Our board decided to use a portion of our challenge grant to hire a renowned consultant to develop a five-year strategic plan. The consultant began the process by conducting an in-depth survey with CHAI's families, staff, donors, stakeholders, CEO's, rabbis and community leaders to determine what CHAI should look like in

the future. In April, we hosted a board retreat led by the consultant, where we put together initial ideas of CHAI's goals and strategies. In June, we held a staff retreat to discuss how the plan would be implemented and who would be accountable for each outcome. Once all of the pieces were in place, the consultant created a draft of our plan including four goals with detailed tactics and a dashboard to measure our success. She also created a one-page document outlining the highlights that we were able to post on our website and give people an introduction to what CHAI's plan includes in a digestible format. In August, after a year of hard work, our board voted to approve the strategic plan. We have been monitoring our progress at each board meeting and are proud to report all is on track!

In June, our annual fundraiser was held at Southfork Ranch, celebrating CHAI's 40-year history. We had 80 first-time attendees come to celebrate with us. The CHAI residents created beautiful paintings that were offered in a silent auction at the event. During the fall we hosted a Past Presidents Lunch, where we updated our past leaders on CHAI's future and discussed areas where they might be able to participate.



*Lisa J. Brodsky* *Julie Morlend*

**Lisa Brodsky, MSSW**  
CEO

**Julie Morlend**  
Board President



We are excited to announce we had a donor opportunity to add a ninth home to the CHAI community. The female side of the Todd House is now called the Alan M. Utay House. The home was generously donated by Sam Utay in memory of her husband Alan.

In addition, we moved our day program (Individual Skills and Socialization) to the Jewish Community Center (JCC) beginning March 1, 2023. We moved into a large space and now accommodate 15 residents. Our new space allows us to integrate with programming at the JCC (preschool, seniors, and athletics). Our residents also continue to go on outings in the community twice a week.

We have continued to have a resident speak at each board meeting to give them a chance to share about their CHAI experience and help the board get to know a bit more about each resident. We have had very positive feedback from the board from these interactions. In an effort to improve our communication with families, we've been sending Lisa's Leadership Updates each quarter that contains information with what's new at CHAI, a staff spotlight, advocacy updates and upcoming events.

2024 is sure to be an excellent year ahead with Ricki Shapiro taking the reins as President of the Board. She will continue to focus on the strategic plan goals including year-round fundraising efforts and taking our beloved organization to the next level.

CHAI's staff, families, board, donors and partners each play a key role in making CHAI such a wonderful organization. We sincerely want to thank you for trusting us to lead CHAI and our vision for CHAI's future.





# COMMUNITY ENGAGEMENT

CHAI is extremely grateful for support from individuals and community partners willing to volunteer time to brighten our residents' days. Over 200 individuals engaged with the CHAI residents through visiting the group homes and hosting events and holiday celebrations.





Thank you to our community partners who during the past year gave the CHAI residents the opportunity to experience valuable social, spiritual, and exciting programming in our community.

**Community Partners:**

Aaron Family Jewish Community Center  
Adat Chaverim  
Congregation Anshai Torah  
Congregation Beth Torah  
Congregation Shearith Israel  
Jewish Federation of Greater Dallas  
The Legacy Senior Communities  
Levine Academy  
Moishe House  
Temple Emanu-El  
Temple Emanu-El Sisterhood  
Temple Shalom Brotherhood  
Temple Shalom Sisterhood  
Temple Shalom  
Texas A&M Medical and Dental Students  
Texas Instruments Jewish Employee Network



# 2023 CHAI LIFE SPONSORS AND ANNUAL CAMPAIGN DONORS

We are grateful to all the donors who generously donated to our 2023 Annual Campaign and/or were donors or sponsors of CHAI LIFE at Southfork Ranch. Contributions of \$180 or more are listed.

## **\$20,000 - \$45,000**

Anne and Alan Feld  
Staci and Jeff Mankoff  
Leo and Rhea Faye Fruhman Foundation/  
Joe Goldman  
Patricia and Andrew Michael  
The Rubenstein Foundation/  
Jeri Lyn and Jeff Sebert

## **\$10,000 - \$16,500**

Christine Allison  
Fran and Mark Berg  
Susan and Allyn Kramer  
Roy and Esther Barzune Stein Endowment\*  
Linda and Rob Swartz  
Wal-Dot Foundation  
William and Sylvia Zale Foundation

## **\$5,400 - \$9,999**

Anonymous  
Dawn and Todd Aaron  
Carolee Blumin  
Patsy and Michael Hochman Foundation  
Cathy and Joel Brook  
Betsy and Mark Kleinman\*  
Raelaine Radnitz  
Celia and Larry Schoenbrun\*  
Marion and Jack Spitzberg  
Kalman and Ida Wolens Foundation

## **\$3,600 - \$5,000**

Anonymous (2)  
Carol and Steve Aaron  
Susie Avnery\*  
Minnie and Keith Blackwell  
Bland Garvey  
Chulew Private Foundation/  
Rachel Chulew and Hayden Bernstein  
Lori and Michael Cohen\*  
Todd Estes  
Nicole Herskowitz and John Lamb  
Barbara and Clive Miskin  
Shirley Morris  
Carol and Stuart Morse  
Sandy Nachman  
Ann and Michael Ochstein\*  
Karen Dubrow and David Romick  
Ann Rosenberg  
Beverly and Cary Rossel  
Ricki and Gabriel Shapiro  
Nancy and Jerry Szor\*  
Veritex Community Bank





## **\$1,900 - \$3,000**

Barbara Bell  
Lisa and Neil Goldberg  
Marcy Helfand  
Sandy and Mark Kaman  
Kerri and John Rosenberg  
Rubin Family Foundation  
Julie and Jay Liberman  
Linda and Clint Schuhmacher  
Rosalie Taubman  
Sam Utay\*  
Ginger and David Wallace

## **\$1,800**

Anonymous (2)  
Katherine Albert  
Kimberly S. Bates Foundation  
Susan and Evan Bates  
Barbara and Michael Donsky  
Elise and Robert Donosky  
Nanci Dubrow  
Amy Foxman and Amerinder Bindra  
Angela Horowitz French and Doug French  
Janis and Dan Gail  
Barbara and Larry Glazer\*  
Herbert Goldberg Company  
Lauran and Robert Goldberg  
Shelli and Marshall Goldberg  
Sherry and Ken Goldberg  
Barbara and Bill Gutow  
Ynette and Jim Hogue  
Carole Ann and Jay Hoppenstein\*  
Judy and Jeff Kogutt\*  
Marsha Lev\*  
Michelle and Mark Meiches  
Neuberger Berman Investment Advisors  
Rabbi Andrew Paley and Deborah Niederman  
Barbara and Randall Rosenblatt\*  
Rothkopf Greenberg Family Foundation  
Melissa Anne and Jonathan Rubenstein  
Cindy and Stuart Spechler  
Barbara and Shelli Stein  
Hilarie and Peter Weinstock  
Lois Wolf

## **\$1,080 - \$1,500**

Anonymous ( 2)  
Melissa and Baer Ackerman  
Brenda and Ron Bliss  
Phyllis Alper-Blood  
Lisa Brodsky and Beth Young  
Carr, Riggs, and Ingram, LLC  
Sharon and David Chortek  
Cheryl and Randy Colen  
Janice and Tony Gambino  
Lori and Rick Golman  
Patricia and Bennett Goodman  
Karen and Craig Goodman  
Debbie and Ron Greene  
Irma Grossman  
Greta\* and Howard Herskowitz  
IMA, Inc.  
Louise W. Kahn Endowment\*  
Janet and Gary Kaner  
Leslie and Steven Levin  
Karen and Walter Levy  
Ellen and Jim Liston\*  
Marsh & McLennan Agency  
Bobbi and Richard Massman  
Jana and Bob Milstein  
Bette and Gary Morchower  
Julie and Rob Morlend  
Elaine and Trevor Pearlman  
Sally and Rick Rosenberg\*  
Ike and Fannie Sablosky Foundation  
Lisa and Donald Schwarz  
Ruthie and Alan Shor\*  
Joan Skibell  
Rabbis Nancy Kasten and David Stern  
Sandra and David Veeder  
Karen and Howard Weiner  
Mary and Michael West  
Larry Wolfish

# 2023 CHAI LIFE SPONSORS AND ANNUAL CAMPAIGN DONORS

## **\$500 - \$1,000**

Anonymous  
Gilian and Steve Baron  
Sol and Estelle Barzune Endowment\*  
Sheri and Larry Berk  
Kirschner-Bookatz Family Foundation\*  
Susie and Joel Carp  
Suzanne Goldstein and Paul Chafetz  
Nicole and Kevin Cooper  
Fran and David Eisenberg\*  
John Falls  
Cecelia and Stanley Feld  
Lynn and Gil Friedlander  
Karen Glanger  
Berta Goetz\*\*  
Laurie and Dan Goetz\*  
Rebecca and Jacob Goetz  
Roslyn Goldstein  
Joyce and Wayne Goodowitz  
Elaina and Gary Gross  
Emma and Gary Gudis  
Sandra Hancock  
Allison and Steven Harding  
Mark Jacobs  
Patricia and Howard Kraines  
Carol and Mark Kreditor\*  
Carol and John Levy  
Zelene and Bob Lovitt  
Lisa and Mike Maberry  
Patty and David Miller  
Lucy and Ebb Munden  
Linda and Chris Najork  
Lynda and Gordon Newman  
North Dallas Bank & Trust  
Myra and Stuart Prescott \*  
Stan Rabin  
Serena Ritch  
Terry and Bert Romberg  
Lisa and Steve Rudner  
Melanie and Ivan Sacks  
Hope and Robert Sheft  
Trudy and Benedict Termini  
Tim Weber  
Linda and Happy Webberman  
Alison and Michael Weinstein  
Gay Winter

## **\$360 - \$400**

Emily Ackerman and Eduardo Gildenson  
Adrian Allen  
Andrea and Jonathan Bard  
Lynn and Mark Bernstien  
Barbara and Barry Brown  
Cindy and Bob Cohen  
Randee and Colin Cope  
Zachary Denn  
Paddy and Barry Epstein\*  
Darcy and Marc Freedman  
Pam and Ray Garfield  
Abby and Benjamin Goodman  
Barbara Carr-Goodman and Herb Goodman  
Peggy and Lenny Goodman  
Wendy and David Haynes  
Karen and Reid Heller  
Miriam and Ron Honig  
Caryn and Joe Kboudi  
Lynne and Larry Kohn  
Carol and Eliot Litoff  
Robert Millen  
Peggy and Dave Millheiser  
Abigail and Grant Mindle  
Cindy and Irv Munn  
Jeanette and Mike Pincus  
Lauri and Irving Prengler  
Liat Sacks  
Amy and Jason Sandler  
Elaine Sheft  
Sandy and Larry Silverman  
Sheri and Allen Udisky  
Halie and Drew Vine  
Jackie and Steve Waldman  
Jean and Bob Weinfeld  
Cheryl and Lane Weitz  
Carolyn and Michael Wilkov  
Peggy Papert and Ralph Zatkis

## **\$200 - \$359**

Mona and Artie Allen\*  
CPH Braestrup  
Liz and Rusty Cooper\*  
Wyona and Maurice Efune  
Ragen and Roy Elterman  
Ellen Feibel



## **\$200 - \$359 continued**

Marcela Wentzel and Joseph Fogle  
Rozelle and Richard Gilman  
Rita Sue and Alan Gold \*  
Bill Goodman  
Lois Gordon Endowment \*  
Storrow and Murray Gordon  
Marilyn and Larry Guzick  
Ruth and Larry Kullman  
Nancy Lewis  
Margaret and Jed Morse  
Janine and Charles Pulman  
Ruth Robinson  
Carolyn and Wyatt Rousseau  
Craig Rubenstein  
Peachy Rudberg  
Elaine and Morris Rutchik  
Jan and Michael Schrimmer  
Suzy Schwartz  
Jacquie and Myron Schwitzer  
Judy and Hal Sommer  
Phyllis and Ron Steinhart  
Robin and Evan Stone  
Alla and Vladamir Tsurkan  
Janice Sweet Weinberg and Arthur Weinberg \*  
Helga and Gerardo Weinstein\*  
Jolene and Harv Weisblat\*  
Ethel Zale  
Ilene and Perry Zidow\*



## **\$180**

Anonymous  
Rusti\* and Howard Bell  
Elizabeth and Steven Berger  
Stephen Blend  
Carol and Edward Burger  
Cynthia Curtis  
Cantor Don Croll and Jan Gartenberg  
Beck Dennis  
Leah and David Engelberg  
Arlene Jacobs and Allen Feltman  
Marilyn Fiedelman  
Anita Friedman  
Marsha Gaswirth  
Sharon and Eric Goldberg  
Frances and Allan Harris  
Sophie and Alex Jakubowich  
Linda and Murray Johnson  
Marcy and Jeffrey Kahn  
Joseph Kaner  
Dorothy Jane Kassanoff  
Debbie and Bruce Katz  
Susan and Michael Kottwitz  
Lori and Robert Krolik  
Laura and Barry Levy  
Betty and Jay Lorch  
Merle and Scott Nason \*  
Shari and Ira Nevelow  
Deborah and Terry O'Connor  
Cindy and Robert Quint  
Stacy and Jerry Rasansky  
Rosella Reinthal  
Merle Rubin  
Debbie and David Schweig  
May Sebel  
Ellen St. Clair  
Meredith and Barry Steinhart  
Rhona Streit  
Joseph and Helen Swiff Fund \*  
Cathy and Todd Teiber  
Maddy and Mark Unterberg  
Natalie and Michael Waldman  
Andrea and Loren Weinstein  
Polly Weisberg  
Janet and Alan Weissman

\* Fund of the Dallas Jewish Community Foundation

\* Fund of Communities Foundation of Texas

\* of Blessed Memory

# GRANTS

## **Jewish Federation of Greater Dallas**

\$20,000 Core Allocation

\$75,000 Nursing Program

## **Feldman Family Foundation TX**

\$15,000 General Operating

## **Chrest Foundation**

\$5,000

## **Texas Instruments Foundation**

\$1,250

## **Anonymous Foundation**

\$10,000

## **Challenge Grant**

\$30,000 - Anonymous Foundation

\$5,000 - Marian and Jack Spitzberg

## **Community Engagement Program**

\$250 - Deborah Malafsky

## **Employee of the Year**

\$300 - Linda Rae Bomash Fund of the  
Dallas Jewish Community Foundation/  
Barbara and Larry Glazer

\$250 - Sarah Lipinsky





# FISCAL YEAR

November 1, 2022 - October 31, 2023

## Revenues:

### CHAEF

Distribution from Endowment Funds

### Special Event

CHAI LIFE event at Southfork Ranch

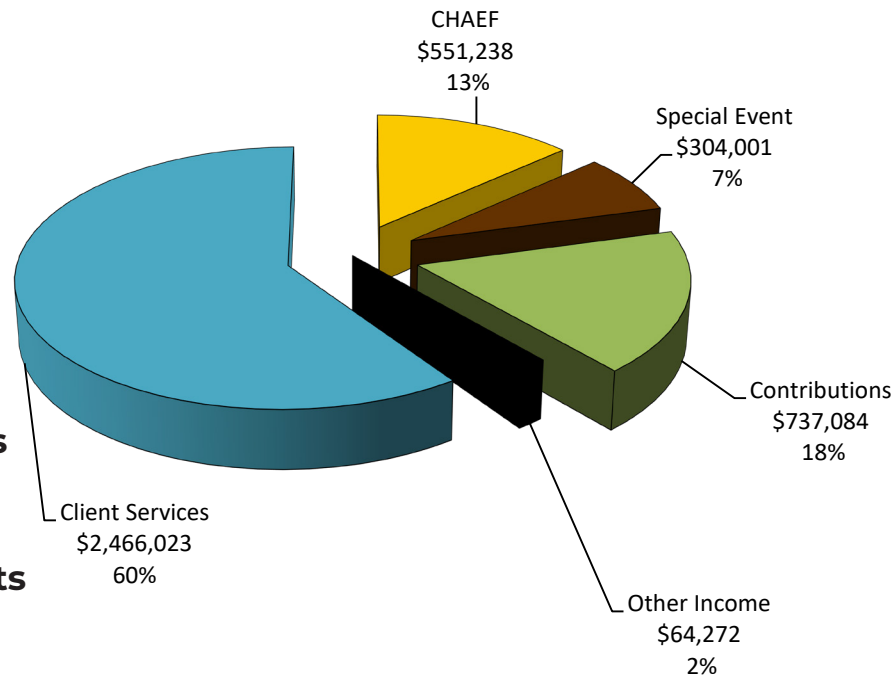
### Contributions

Annual Campaign, Tributes, and Grants

### Client Services

State Reimbursement & Client Payments

## Support & Revenue



## Expenses:

### Administrative

Central Office Expenses

### Fundraising

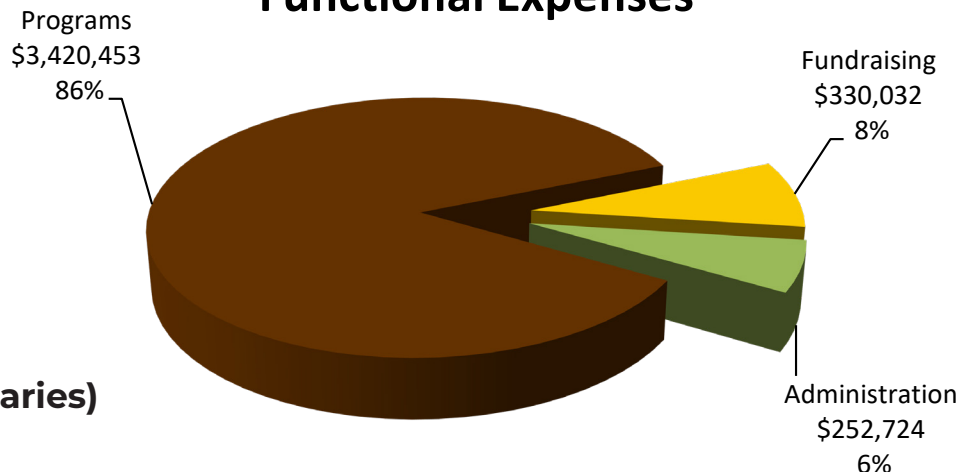
Printing, Postage, Event Expenses

### Programs

Resident/Client Care (including salaries)

Transportation Activities

## Functional Expenses



# 2023 LEADERSHIP AND AWARDS

## Officers

Julie Morlend

*President*

Ricki Shapiro

*President Elect*

Todd Estes

*Vice President*

Ethan Prescott

*Vice President*

Linda Swartz

*Vice President/Secretary*

## Executive Committee Members at Large

Adrian Allen

Judy Kogutt

Elise Donosky

*Immediate Past President*

## Board of Directors

Jackie Austein

Brian Bertcher

Kevin Cooper

Adam Diamond

Amy Foxman

Sandy Kaman

Josh Kaufman

Serena Ritch

Jason Sandler

Drew Vine

## Honorary Life Members

H.S. (Buddy) Rosenthal\*

Dr. Carmen Miller Michael\*

\*of blessed memory



Ricki Shapiro presenting the  
Cherished Angel Award to  
Beverly Rossel



Milton Levy Leadership Award  
winners Elise Donosky and  
David Romick



Some of our past and current Directors



COMMUNITY HOMES FOR ADULTS, INC.

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Community Partner of  
**Jewish Federation**  
OF GREATER DALLAS