

# FINAL REPORT

## STRATEGIC ALLOCATIONS TASK FORCE JANUARY 2019

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### INTRODUCTION

The Strategic Allocations Task Force met over the summer and fall to produce a report on how to maximize the use of funds raised for the Jewish Superhighway. The Jewish Superhighway is a metaphor for meaningful Jewish experiences and Jewish journeys; where Jewish life is vibrant and no one is left behind.

The task force, chaired by Jewish Federation of Ottawa Board member Danya Vered, was a representative committee composed of Kevin Barwin, Josh Engel, Harold Feder, Jessica Greenberg, Marina Milyavskaya, Tal Scher, and Jason Shinder. Sarah Beutel and Andrea Freedman provided professional support to the task force.

When the task force began its work, it was not yet clear how much money would be raised for the Jewish Superhighway. Though the Annual Campaign remains ongoing, it has been highly successful and at least \$1 million in new funds has been raised for the Jewish Superhighway.

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### KEY THINKING

At the onset of the process, the task force spent time developing a foundational approach to the new allocations process, in order to ensure that its thinking was aligned with key components of our final work product:

1. Funding is open to current Federation agencies, Ottawa Jewish organizations, and individuals for work that focuses on Jewish Ottawa.
2. Funding must align with Federation's vision, meet identified priorities, and have demonstrable impact.
3. Funding is designed to be temporary and not become annualized funding. Community needs are not static, nor are the same individuals and organizations always in the best position to respond. Community life is fluid, and so allocations must be too.

Samples of types of strategic funding include:

- a. Seed money for specific efforts (e.g., a program or participation grant);
- b. One-time funding (e.g., creation of a maker space, search process costs to bring in the right professional leader);
- c. An individual or organization requiring funding to scale up their work;
- d. Seed money for an idea, or for excellence, that if it works the organization then becomes responsible for (e.g., higher quality French program).

4. Day school funding will include a formula that allows both Torah Day and OJCS to pursue a path to excellence.
5. Appropriate stewardship of donor dollars, while not being overly cumbersome.
6. A clear communications strategy for the allocations, directed at both agencies/organizations and the general community, will be critical to the success of this initiative.

As with any thoughtful process, the task force grappled with how best to apply this thinking to the betterment of Jewish Ottawa.

The scope of work was vast and this report contains the following:

SUMMARY OF KEY RECOMMENDATIONS – P.1  
DETERMINING ALLOCABLE DOLLARS AND COHERENCE IN ALLOCATIONS - P.3  
JEWISH DAY SCHOOL FUNDING - P.7  
LOGIC MODEL – MEASURING DESIRED OUTCOMES - P.8  
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## SUMMARY OF KEY RECOMMENDATIONS

- 1) While the number will vary, depending on the final Annual Campaign results, the allocable dollars available for the purposes of this report was assumed to be \$1 Million.
- 2) All increased gifts will be allocated for the Jewish Superhighway for a period of two years through competitive RFP processes.
  - a. Cost of living increases for current beneficiary agencies will not be available, though all are welcome to apply for new funding for specific initiatives through the various RFP processes.
- 3) \$70,000 in operational funds will be allocated to Torah Day School to support its efforts of being a School of Excellence.
- 4) A new task force to examine funding for Jewish Day Schools should be launched early in 2019.
- 5) To ensure seamlessness between Federation's various funding streams:
  - a. A strategic priorities committee will be created as a sub-committee of the Federation's Board of Directors to make recommendations to the Board regarding available allocable dollars; and
  - b. The work of the current grants and evaluation committee will be expanded.
- 6) Determining the impact of designated gifts: funds designated should first be allocated to each of the four outcomes of the Jewish Superhighway. Then the remaining strategic funding should be used to top up the four outcomes, with the overall goal of maximizing impact and making the most of strategic dollars on the Jewish Superhighway.

- 7) Supplementary giving directed to agencies (e.g., designated for projects on the Jewish Superhighway) will be taken into consideration when agencies apply for funding through the new RFPs.

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## **DETERMINING ALLOCABLE DOLLARS & COHERENCE IN ALLOCATIONS**

### **PROCESS**

The goal of the task force is to give recommendations to Federation's Board on the best ways to create a tailored, but simple, process for allocating "strategic funding," to fulfill the vision of the Jewish Superhighway. The strategic funding will not take place in a silo, nor will it succeed on its own. It is important that strategic funding decisions are made within the greater context of Federation's allocations and granting decisions. This will ensure that the funds are deployed where they are needed most and that organizations understand the totality of Federation's objectives.

#### **1. Creation of a new sub-committee of the Board – The Strategic Priorities Committee**

This high-level committee will consist of select representatives of the Board, senior Federation staff, and community leadership.

The role of the committee will be to:

- Understand Federation's current role in funding community priorities;
- Constantly assess community needs, including unmet needs; identify areas in which Federation should provide time-limited funding, and help develop sustainability strategies if needed (with a few years' lead-time);
- Make recommendations to the Board about dollar amounts for:
  - Operating budget for Federation-run programs and services;
  - Allocations to local organizations: School funding, and "Program" and "Organizational" funding; and
  - Strategic funding
- Once approved, the funding decisions will be communicated to the Grants & Evaluation Committee, the Micro-Grants Committee, and other relevant committees.

#### **2. Expand the role of the Grants and Evaluation Committee**

The existing structure of the Grants and Evaluation Committee can be leveraged to streamline the decision-making on operational/organizational funding and strategic funding. The Grants and Evaluation Committee is currently divided into two groups: one deals with funding for schools and one deals with funding for all other organizations. New committee members can be added to make the committee larger, and the sub-committees can handle the various funding streams.

The Grants and Evaluation Committee will continue to:

- Oversee the request for proposals for two-year Program Funding;
- Oversee Federation's Organizational Funding (to the six largest community agencies);
- Oversee operational funding to Day and Supplementary schools; and
- Continue to assess applications for the Fund for Innovative Capacity Building twice a year.

Added to the mandate of the Grants and Evaluation Committee:

- Review and recommend funding for Federation's new strategic funding streams including:
  - Jewish Journeys Grants;
  - Fund for Israel Journeys;
  - Caring for the Vulnerable;
  - Security Matching Fund;
  - Special Education Fund for Day Schools; and
  - Strategic funding for Day Schools.

Approval Process for the committee's funding recommendations:

- Grants and Evaluation Committee will make funding recommendations. Final funding decisions will be approved by the Board. The exception is the Capacity Building Fund that is donor-directed, where the donor continues to have final approval.

### **3. Expand the role of the EG Grants review committee to that of Micro-Grants Review Committee**

The structure of the EG Grants Committee can be expanded to include representation for all ages and denominations. The committee can be divided into two (or more, if required) smaller sub-committees to be able to handle the expected increased number of applications.

Approval Process for the Micro-Grants Committee's funding recommendations:

- Committee's decisions to be approved by Federation senior staff. In the case of a disagreement between the committee and staff, the final decision will be made by the Board. This will ensure a quick turn-around time. It will also ensure that funding decisions continue to reflect the mission, values, and priorities of Federation.

### **4. Create a separate process for implementing the new Jewish Life Incentive Grants program**

This program is structured to offer discounted memberships to encourage individuals and families to join participating synagogues/temple and the SJCC. The program is still under development and will require that potential recipients of incentive grants be vetted to ensure that they are new to memberships at the SJCC and synagogues. Synagogues and the SJCC will sign an agreement that includes commitments to verify the newness of potential recipients in their records, and include a formal welcome.

This program will be piloted in Year 1 and 2, and eligible participants will receive incentive grants on a first-come, first served basis. Federation staff will administer the program, in partnership with the SJCC and participating synagogues. The Strategic Priorities Committee will monitor the program's outcomes and determine next steps.

## **RECOMMENDATION ON HOW SUPPLEMENTARY GIFTS IMPACT STRATEGIC FUNDING:**

The task force recommends the following process for allocating strategic funding:

**Step 1:** The Strategic Priorities Committee evaluates the total funds raised during the Annual Campaign and determines amounts to be allotted to the operating budget for Federation programs and services, for operations for local organizations, and for strategic funding.

**Step 2:** The Strategic Priorities Committee evaluates the priorities of the community and determines the ideal amount of strategic funding to be allocated to each of the four investment areas (Jewish experiences, education, the vulnerable, and security). The committee then applies directed gifts from the Challenge Fund to each of the investment areas, and tops-up each area to arrive at the ideal amounts.

**Step 3:** The Grants and Evaluations Committee will evaluate and rank individual applications for each investment area, taking into consideration the total amount that agencies have received and the types of projects that have been funded by supplementary gifts (Federation staff will provide the Grants and Evaluations Committee with a list of supplementary gifts to agencies to date (amounts and projects)). The goal will be to balance the desire to maximize scarce resources throughout the community with the strongest applications from agencies, organizations, and individual community members.

## Summary of New Funding Process

<b>Jewish Federation of Ottawa Board of Directors</b> Makes final funding decisions, with the exception of donor-directed funds and micro-grants	
<b>Strategic Priorities Sub-Committee</b> <ul style="list-style-type: none"><li>• Recommends dollar amounts for all of Federation’s funding streams</li><li>• Monitors and evaluates the Jewish Life Incentive Grants program</li></ul>	
<b>Grants and Evaluation Committee</b> <b>Sub-Committee for Schools, oversees:</b> School operational funding Strategic Funding for Day Schools Special Education Fund for Day Schools Fund for Excellence in Supplementary Schools  <b>Sub-Committee for Jewish Life</b> Program & Organizational funding Caring for the Vulnerable Jewish Journeys Grants Security Enhancements & Security Matching Funds Innovative Capacity Building Fund Fund for Israel Journeys	<b>Micro-Grants Committee</b> Reviews applications for micro-grants on an ongoing basis. Divided into sub-committees to handle the increased volume of applications.

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## **JEWISH DAY SCHOOL FUNDING**

The task force acknowledges the importance of day school education as fundamental to securing a strong future for Jewish Ottawa, and that the disparity in current funding between Torah Day School (TDS) and the Ottawa Jewish Community School (OJCS) makes it even more challenging for TDS to pursue its goal of being a school of excellence. While a major focus of the task force has been to design RFP processes that foster one-time strategic investments, an exception has been identified. The task force recommends that \$70,000 per year be allocated on an ongoing basis to Torah Day School, to support a school of excellence.

Note: The intent is to be able to maintain this funding to the greatest extent possible, on an annual basis. The Strategic Priorities Committee will determine the available amount each year.

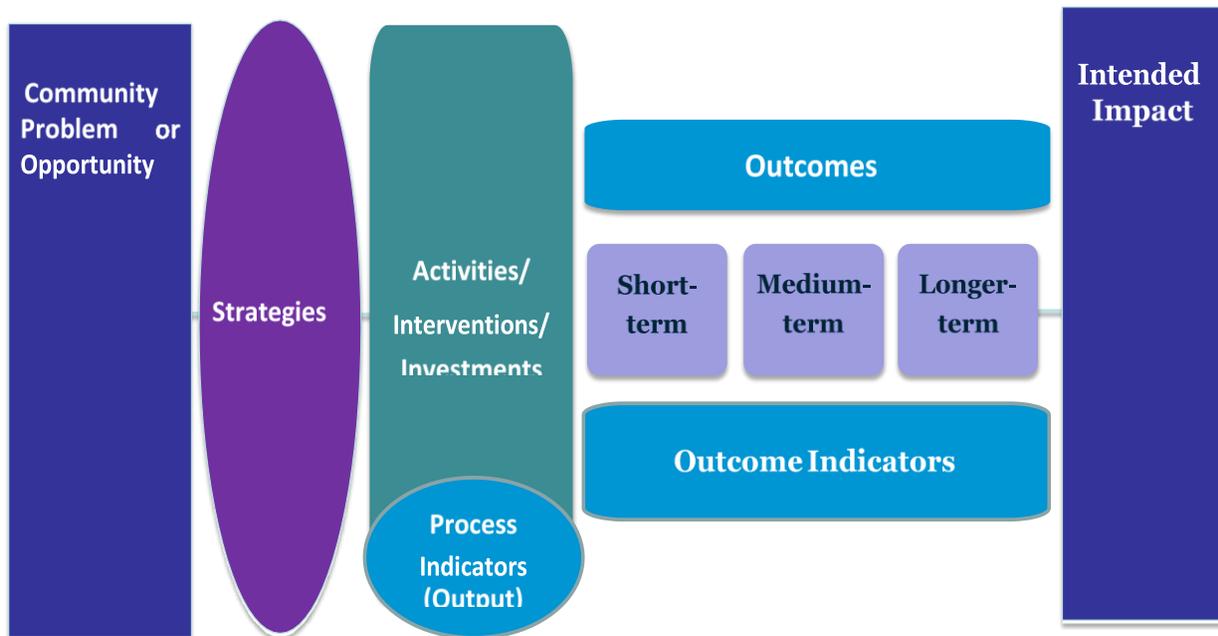
Furthermore, the task force recommends that Federation should examine and consider:

- the overall level of funding for day schools;
- the totality of how dollars for Jewish education are allocated, taking into account the allocation formula for new strategic funding; and
- the best way to provide funds for Jewish education in Ottawa (e.g., funding schools and/or subsidies for families).

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## LOGIC MODEL

The purpose of a logic model is to articulate your desired outcome and then identify the steps needed in order to get there<sup>1</sup>. For the purpose of the strategic allocations process, the logic model below is intended to provide a framework for how applications for funding will be evaluated.



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<sup>1</sup> After careful research, the decision was made to use the excellent logic model from Combined Jewish Philanthropies.

# REQUEST FOR PROPOSALS IN STRATEGIC AREAS

In order to ensure that the allocations process is nimble, there will be many opportunities for agencies, Jewish organizations, and individuals to apply for funding. The aim is to ensure that the Jewish Superhighway has multiple, high-quality on-ramps, that barriers to participation are removed, and to assist the most vulnerable in their journeys. In designing the RFPs, the following were considered.

- Existing events and activities can receive funding through the RFPs, so long as the request is for funding to scale up something that already exists. Funding should be for a limited time, depending on the application requirements, not for ongoing programming in perpetuity.
- Grants should not cover the full cost of a program, and applicants need to demonstrate that they will seek additional revenues to meet the cost of their proposal (e.g., revenue from fees, other donors).
- The RFP process will be evaluated after the first year of implementation to ensure it is achieving the objectives of the task force. Any necessary amendments to the process will be undertaken (e.g., scoring, evaluation criteria).

<b>Strategic Investment Areas: Building the Jewish Superhighway</b>		
<b>Meaningful Jewish experiences and journeys</b>	<b>Where no one is left behind</b>	<b>Journeys are safe and secure</b>

### Strategic Funding

Note: These numbers remain estimates. The Strategic Priorities Committee will make final recommendations to the Board.

<u>Annual Grants</u>	<u>Apply twice times a year</u>	<u>Apply anytime</u>
Fund for Israel Journeys \$25,000	Jewish Journeys Grants \$105,000	Jewish Experience Micro-grants \$35,000
Strategic Funding for Day Schools \$200,000	Fund for Excellence in Supplementary Schools \$25,000	Incentivizing Jewish Life \$200,000
Special Education Fund for Day Schools \$50,000	Caring for the Vulnerable \$240,000	Security Matching Funds \$50,000

## JEWISH EXPERIENCE MICRO-GRANTS

Inspire Jewish engagement opportunities for all ages to facilitate on-ramps onto Ottawa's Jewish Superhighway, thereby increasing participation in Jewish life.

One-time grants up to \$2,500 to individuals and organizations.

### Goals of the fund

- Support organizations and individuals to develop new and creative engagement opportunities that build affiliation and Jewish identity; engaging more people in Jewish life.
- To optimize engagement, support a broad range of opportunities:
  - Can target any specific age group or multiple age groups
  - Inspiring Jewish opportunities including: cultural, educational, recreational, and religious (varying denominations)
  - Reaching diverse geographic areas in the National Capital Region
- Funded experiences lead to further engagement (e.g., participants stay on the Jewish Superhighway)

### Federation's desired Return on Investment (ROI)

- Minimum 20% of participants are new or relatively new to Jewish community life (e.g., little or no previous involvement in the last six months)
- Minimum 75% of participants have a positive experience (as reported by grantees who distribute a simple and standard Federation survey to participants)
- More than 50% of participants in funded activities report that they are now more likely to participate in another Jewish community event/activity (as reported by grantees who distribute a simple and standard Federation survey to participants)

### Who is eligible to apply?

- Ottawa individuals
- Ottawa Jewish organizations
- Partnerships among individuals and organizations are encouraged

### What kinds of activities are eligible?

- Educational, recreational, cultural, religious, and other Jewish events
- One-time programs, conferences, courses
- Fundraising events are not eligible for funding

## Eligibility requirements to be considered for funding

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- Applications have the ability to build affiliation and Jewish identity in the nation's capital; engaging more people in Ottawa's Jewish life – thus increasing traffic on the Jewish Superhighway
- The program fits with Federation's mission: to advance and promote an exceptional quality of Jewish life; and its vision: a thriving Ottawa Jewish community that is inclusive, accessible, educated, and engaged
- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.

## Evaluation criteria

A committee will rank applications on the following criteria.

- Event/activity will likely engage new people in Jewish life
- The experience will be meaningful and impactful for participants
- In addition to being a good idea, there is a further reason to fund, in that the experience offered either fills a gap or directly appeals to an under-served population
- In addition to being a good idea, the experience offered is either done in direct partnership with another organization or is synergistic with the works of others in the community.
- Efficacy of action plan (clear work-plan and timelines; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)

The following scale will be used:

- 4 points – strongly agree/very likely
- 3 points – agree/likely (reasonable chance at success)
- 0 points – unsure
- 1 point – disagree/unlikely
- 2 points – strongly disagree/very unlikely

Projects receiving a score of 11 or more will be considered for funding and the committee will then make a final recommendation.

## **Application deadline**

- Applications are accepted on an ongoing basis and must be submitted a minimum of six weeks prior to the event/program. Applications will be funded on a first-come, first-served basis – while dollars remain in the fund.

## **JEWISH JOURNEYS FUND**

Inspiring Jewish engagement for all ages in Ottawa's Jewish community.

Provides grants of up to \$15,000/year (maximum of three years) for organizations to bring more people onto Ottawa's Jewish Superhighway through more intense programming and outreach.

## **Goals of the Fund**

- Support organizations to inspire Jewish engagement and affiliation for all ages by funding:
  - Pilot new and creative events, programs, and initiatives
  - Scale up successful programs/activities to increase their impact
- Build Jewish identity through significant, sustained and meaningful Jewish experiences; appealing to those:
  - Already engaged
  - Somewhat engaged
  - Not engaged

## **Federation's desired Return on Investment (ROI)**

- Minimum 15% of participants are new or relatively to your organization(s) (e.g., little or no previous involvement in the last six months);
- Minimum 75% of participants have a positive experience (as reported by grantees who distribute a simple and standard Federation survey to participants); and
- Minimum 50% of participants in funded activity report that they now are more likely to participate in other Jewish community events/activities (as reported by grantees who distribute a simple and standard Federation survey to participants)

## **Who is eligible to apply?**

- Ottawa Jewish organizations
- Partnerships among individuals and organizations are encouraged

## **What kinds of activities are eligible?**

- Support for initiatives in the following realms: educational, recreational, cultural, and other Jewish programs/events that are designed for a more intensive engagement opportunity than a one-off program (which could be funded through micro-grants)

## Eligibility requirements to be considered for funding

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- The program fits with Federation's mission: to advance and promote an exceptional quality of Jewish life; and its vision: a thriving Ottawa Jewish community that is inclusive, accessible, educated and engaged
- Through sustained activity, applications have the ability to build affiliation and Jewish identity; engaging more people in Jewish life – thus increasing traffic on the Jewish Superhighway
- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.
- Organizations accept funding with the full understanding:
  - Funding is for a maximum of three years and then the specific program/initiative is no longer eligible for funding
  - After the first year of funding, in order to maintain eligibility (if appropriate by all other measures), applicants must develop a phase-out plan or sustainability funding strategies to ensure ongoing viability.

## Evaluation criteria

A committee will rank applications on the following criteria.

- Event/activity has the potential to appeal to those who are less engaged in Jewish life
- The experience will be meaningful and impactful for participants
- In addition to being a good idea, there is a further reason to fund, in that the experience offered either fills a gap or directly appeals to an under-served population
- In addition to being a good idea, the experience offered is either done in direct partnership with another organization or is synergistic with the works of others in the community.
- Efficacy of action plan (clear work-plan and; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)
- Clarity that the funding will be used to:
  - Pilot new and creative events, programs and initiatives; or
  - Scale up successful programs/activities to increase their impact in the community

The following scale will be used:

4 points – strongly agree/very likely

3 points – agree/likely (reasonable chance at success)

0 points – unsure

-1 point – disagree/unlikely

-2 points – strongly disagree/very unlikely

Projects receiving a score of 13 or more will be considered for funding and the committee will then make a final determination.

### **When can I/we apply?**

- Applications are accepted twice a year

## **FUND FOR ISRAEL JOURNEYS**

Inspiring Jewish connection through a first-hand journey to Israel. Connecting people to the land of Israel, Jewish heritage, to each other and to the people of Israel.

This fund provides one-time grants of up to \$25,000 to Jewish Ottawa-based organizations planning an Israel-based travel experience to encourage participation in Jewish life.

### **Goals of the Fund**

- Build Jewish identity through a meaningful Israel experience
- Program and promotion appeal both to the already engaged and those less or not yet engaged in Jewish life
- Israel experience is accessible to more people by helping to defray the high cost of travel to Israel
- Inspire more people to be active and engaged in the Ottawa Jewish community, building strong Jewish networks through a shared experience
- Strengthens local Jewish organizations by building a cohort of engaged Jews with a shared affinity for the sponsoring organization(s)

### **Federation's Desired Return on Investment (ROI)**

- Minimum 75% of participants in funded trip have a positive experience (as reported by grantees who distribute a simple and standard Federation survey to participants)
- More than 50% of participants in funded trip report that they are now more likely to participate in other Jewish community events/activities (as reported by grantees who distribute a simple and standard Federation survey to participants)
- Criteria around attracting new participants and offering subsidies are met (see below funding criteria – 30% participants are newly engaged; 35% of funds are used for subsidies)

### **Who is eligible to apply?**

- Local Jewish organizations promoting a Zionist agenda

## **Eligibility requirements to be considered for funding**

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- Preference is given to partnerships between organizations
- Minimum five days in Israel
- Accepted target: minimum 30% of participants are newly engaged in Jewish community (e.g., new or not particularly involved)
- Minimum 35% of the funds are targeted to subsidize individual participants (e.g., financial need and/or incentive to get on the Jewish superhighway)
- Israel experience includes a comprehensive pre- and post-travel component
- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.

## **When can organizations apply?**

- Annual application process (successful organization is then ineligible to apply for funding for an initiative for a period of three years)

## **Evaluation criteria**

A committee will rank applications on the following criteria.

- Strong likelihood of success at reaching targets (30% participants are newly engaged; 35% of funds are used for subsidies)
- The experience will be meaningful and impactful for participants
- Efficacy of action plan (clear work-plan and; clearly defined pre and post components; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)
- Likely to inspire more people to be active and engaged in the Ottawa Jewish community, building strong Jewish networks through a shared experience

The following scale will be used:

- 4 points – strongly agree/very likely
- 3 points – agree/likely (reasonable chance at success)
- 0 points – unsure
- 1 point – disagree/unlikely
- 2 points – strongly disagree/very unlikely

Projects receiving a score of nine or more will be considered for funding and the committee will then make a final determination.

### **When can I/we apply?**

- Applications are accepted once a year

## **FUND FOR EXCELLENCE IN SUPPLEMENTARY SCHOOLS**

Dedicated to strengthening and promoting quality Jewish education through the support of supplemental schools with the goal of increasing enrolment; offering superior experiences and supporting students with exceptionalities.

Provides one-time grants to schools up to \$10,000.

### **Goals of the fund**

- Increase enrollment in supplementary schools by:
  - Strengthening their offerings; including implementation of best practices that foster innovation and creativity
  - Increasing/enhancing promotion
- Supporting special education in Supplementary Schools

### **Federation's desired Return on Investment (ROI)**

- In the year following the grant, retention rates and recruitment of students increases so that there is a minimum of 8% overall growth in the school
- Minimum 75% of students have a positive experience (as reported by grantees who distribute a simple and standard Federation survey to participants)
- Minimum 75% of participants report that they are likely to recommend the school to others (as reported by grantees who distribute a simple and standard Federation survey to participants)
- If for special education, the school reports they are now able to meet the needs of a greater number of students with exceptionalities

### **Who is eligible to apply?**

- Local Jewish supplementary schools with a minimum of 15 students

### **What kinds of projects/activities are eligible?**

- Curriculum development
- Investment in educational materials
- Professional development for teachers, administrators, and boards
- Seed funding for pilot projects
- Special education one-time expenses
- Outreach initiatives to encourage more enrolment
- Fundraising events are not eligible for funding

### **Eligibility requirements to be considered for funding**

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.
- Organizations accept funding with the full understanding that it is a one-time grant and cannot be renewed for that initiative.

### **Evaluation criteria**

A committee will rank applications on the following criteria.

- Efficacy of action plan (clear work-plan and; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)
- Activity/investment is likely to (at least one of the following):
  - Improve the quality of education
  - Positively impact enrolment and/or retention
  - Improve capacity to meet the needs of students with learning exceptionalities
- Confidence that a one-time grant will be effective and either that is all that is required to make a difference or school can find other funding sources.

The following scale will be used:

- 4 points – strongly agree/very likely
- 3 points – agree/likely (reasonable chance at success)
- 0 points – unsure
- 1 point – disagree/unlikely
- 2 points – strongly disagree/very unlikely

Projects receiving a score of seven or more will be considered for funding and the committee will then make a final determination.

### **When can schools apply?**

- Applications are accepted twice a year

## FUND TO ENSURE CARE FOR THE VULNERABLE

This short-term grant is intended to provide funds to local Jewish organizations to assist them in caring for the vulnerable or help prevent future vulnerability and will provide grants to organizations of up to \$50,000 in any of the following areas:

- Prevention
- Enhanced services and support
- Technological upgrades to Improve the delivery of care
- Inclusion in Jewish life of people with varying abilities

### Goals of the Fund

- More vulnerable Ottawans can access Jewish life
- Foster increased accessibility and inclusion within the Jewish community, of those with varying abilities
- Education in order to prevent crises in the future
- Increase capacity of organizations to deliver high-quality care

### Maximum length of grant

- Programs/initiatives are eligible for one grant (though it can be spread over three years if desired)
- After the first year of funding, in order to maintain eligibility (if appropriate by all other measures), applicants must develop grant phase-out plans and funding sustainability strategies.

### Federation's desired Return on Investment (ROI)

- Improvement in care and quality of life for vulnerable people impacted by grant (as reported by recipient organizations who can share general info about improvements in health outcomes, observed behaviours, and other quality of life measures they track)
- Increase in accessibility and inclusion (as reported by recipient organization(s))
- Organization agrees to administer the necessary survey and/or reporting requirements (e.g., minimum of people attending a workshop)

### Who is eligible to apply?

- Local Ottawa Jewish organizations
- Partnerships between local Ottawa Jewish organizations

### **What kinds of activities are eligible?**

- Educational programs that deal with prevention
- New and creative programs and services that support the vulnerable, promote inclusion and accessibility to Jewish life
- Technological enhancements to Improve the delivery of care
- Seed funding for pilot projects for services and support
- Scaling up of existing initiatives/programs
- Technology enhancements

### **Eligibility requirements to be considered for funding**

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- Activity, program or service must serve the vulnerable or help prevent future vulnerability among Ottawa's Jewish community
- Activity/program fits with the goals of Federation, caring for the vulnerable and/or increasing inclusion and accessibility
- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.
- Organizations accept funding with the full understanding:
  - Funding is for a maximum of three years and then the specific program/initiative is no longer eligible for funding
  - After the first year of funding, in order to maintain eligibility (if appropriate by all other measures), applicants must develop phase-out plan or sustainability funding strategies to ensure the ongoing viability

### **Evaluation criteria**

A committee will rank applications on the following criteria.

- The service offered fills a gap, has an element of uniqueness or differentiation and/or will be offered in partnership with another local organization(s)
- Efficacy of action plan (clear work-plan and; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)
- Funding helps improve the lives of vulnerable members of Ottawa's Jewish community:
  - Access
  - Inclusion
  - Prevention
  - Enhances the capacity of organizations in the delivery of care

- Confidence that short-term funding will have long-term impact: either because short-term is what is required, or the organization has the ability to secure alternative sources of future if a pilot program proves successful

The following scale will be used:

- 4 points – strongly agree/very likely
- 3 points – agree/likely (reasonable chance at success)
- 0 points – unsure
- 1 point – disagree/unlikely
- 2 points – strongly disagree/very unlikely

Projects receiving a score of nine or more will be considered for funding and the committee will then make a final determination.

**When can organizations apply?**

- Twice a year

## STRATEGIC FUNDING FOR DAY SCHOOLS

Provides one-time, non-recurring grants to promote excellence, collaboration, and sustainability in Torah Day School and OJCS.

**Goals of the funding:**

- Increase retention and enrollment in Ottawa’s Jewish Day Schools
- Equip day schools with resources to provide excellence in education
- Equip day schools with resources to become financially sustainable
- Promote collaborative projects that benefit both schools

**Federation’s desired Return on Investment (ROI)**

- Move the day schools towards financial stability and sustainability
- Increase in the number of students enrolled in the day schools
- Increase retention rates at the day schools
- Increase positive perceptions of the day schools by parents and the community

**Who is eligible to apply?**

- Torah Day School and OJCS

### Strategic funding focus areas:

1. One quarter (1/4) of available funding is to be directed toward one-time activities that lead to financial sustainability.
2. One half (1/2) of available funding is to be directed toward one-time activities that promote excellence in education.
3. One quarter (1/4) of available funding is to be directed toward projects that are collaborations between schools.

### Evaluation criteria

A committee will rank applications on the following criteria.

1. Applications for Financial Sustainability:

This funding is not guaranteed to be annual, and it cannot be relied upon to support additional staff as part of regular operations. **Ineligible applications include** funding for new staff, fundraisers, and multi-year programs or activities.

- Applications will have a significant impact on the financial sustainability of the school. Applications will be judged on their relative impact, based on where the school is now
- Efficacy of action plan, including a strong case for the initiative
- A clear work-plan and timelines
- Accurate budget projection
- Review Committee will take into consideration the totality of funding received by the school, including supplementary gifts

2. Applications that promote excellence in education:

This funding is not guaranteed to be annual, and it cannot be relied upon to support additional staff as part of regular operations. **Ineligible applications include** funding for new staff, fundraisers, and multi-year programs or activities.

- Applications will have a significant impact on the quality of education leading to the growth of the school. Applications will be judged on their relative impact, based on where the school is now
- Efficacy of action plan including a strong case for the initiative
- A clear work-plan and timelines
- Accurate budget projection
- Review Committee will take into consideration the totality of funding received by the school, including supplementary gifts

3. Applications that are collaborative projects:

Collaborative projects are eligible to apply a maximum of three times (apply each year, for three years), and then the specific program/initiative is no longer eligible to apply. After the first year of funding, in order to maintain eligibility (if appropriate by all other measures), applicants must develop a phase-out plan or sustainability funding strategies to ensure ongoing viability.

- Applications will have a significant impact on the growth of the schools. Applications will be judged on their relative impact, based on where each school is now
- Efficacy of action plan including a strong case for the initiative
- A clear work-plan and timelines
- Accurate budget projection
- Review Committee will take into consideration the totality of funding received by the schools, including supplementary gifts

The following scale will be used:

4 points – strongly agree/very likely

3 points – agree/likely (reasonable chance at success)

1 point – unsure

-1 point – disagree/unlikely

Applications receiving a score of **11 or more** will be considered for funding and the committee will then make a final determination.

#### **When can schools apply?**

Once a year. Schools can submit similar applications year over year, which will be given full consideration as long as the funds from each year can stand alone without the requirement for any future funding (for example, schools can apply for funding for a Smartboard for Grades 2-3, and the following year apply for funding for a Smartboard for Grades 4-6). Each application will be evaluated within the context of other applications that year competing for the same available strategic funding. There is no guarantee that the same application that is successful one year will necessarily be successful the next year.

## **SPECIAL EDUCATION – SUPPORT FOR DAY SCHOOLS**

One-time grants to Ottawa Jewish Day Schools to support the educational journeys of more students with exceptionalities.

#### **Goals of the Fund**

- Enable more children with exceptionalities to receive a Jewish day school education
- Equip day schools with the resources they need to be able to accommodate more students with a variety of exceptionalities
- Work towards making Jewish Ottawa even more inclusive

### **Federation's desired Return on Investment (ROI)**

- Grants improve the quality of education for new and existing students with exceptionalities (as reported by schools who assess the students' academic achievements and socialization in school settings)
- Grants improve accessibility and inclusiveness of schools, as perceived by parent body and teachers (measured through a survey administered by the school)

### **Who is eligible to apply?**

- Ottawa Jewish Day Schools

### **What kinds of activities are eligible?**

- Training and professional development for staff
- Technological, curriculum and other upgrades to Improve the delivery of education
- Specialized furniture and equipment that improves accessibility

Note: Day Schools must understand that this funding is not guaranteed to be annual, and it cannot be relied upon to support additional staff as part of regular operations.

### **Eligibility requirements to be considered for funding**

Applications will only be accepted for consideration if the following prerequisites are met and agreed to:

- The initiative fits with Federation's mission: to advance and promote an exceptional quality of Jewish life; and its vision: a thriving Ottawa Jewish community that is inclusive, accessible, educated, and engaged
- Organizations agree:
  - To administer the necessary survey and/or reporting requirements
  - To guidelines re: Federation logo and promotion as a funder, etc.

### **Evaluation criteria**

A committee will rank applications on the following criteria.

- Efficacy of action plan (clear work-plan and; accurate budget projection; strong case for the initiative; ability to meet eligibility requirements)
- One-time funding can have the desired results, or there is confidence the school can find alternative resources in subsequent years if pilot proves successful
- Likely to achieve at least one of the desired results:
  - Enable more children with exceptionalities to receive a Jewish day school education
  - Equip day schools with the resources they need to be able to accommodate more students with a variety of exceptionalities
  - Work towards making Jewish Ottawa even more inclusive

The following scale will be used:

- 4 points – strongly agree/very likely
- 3 points – agree/likely (reasonable chance at success)
- 0 points – unsure
- 1 point – disagree/unlikely
- 2 points – strongly disagree/very unlikely

Projects receiving a score of seven or more will be considered for funding and the committee will then make a final determination.

**When can schools apply?**

- Once a year

**SECURITY ENHANCEMENTS FUND**

Provides grants to organizations who receive a SIP grant from the government of up to \$25,000 of matching funds, to ensure a safe and secure community.

**Goals of the Fund**

- Enable Jewish institutions to benefit from available government funding, which only provides up to 50% of security infrastructure costs. The fund will match up to 50% for the government of Canada Security Infrastructure Program grants
- Ensure a safe and secure community

**Federation’s Desired Return On Investment (ROI)**

- Approved projects are implemented, making the Jewish community even safer

**Who is eligible to apply?**

- Any Ottawa Jewish organization who is a successful SIP grant applicant

**When can organizations apply?**

- As dictated by the government’s SIP timing

## JEWISH LIFE INCENTIVE GRANTS

There are many membership-based organizations in Ottawa that offer high-quality Jewish experiences. As a pilot program, Federation intends to offer incentive grants for discounted memberships to encourage individuals and families to join participating synagogues/temple and the SJCC and participate on a first-come, first served basis. If successful, consideration will be given to expanding the program in future years, perhaps to different organizations.

### **Available funding for individuals and families for new memberships to:**

**(note: these are draft amounts and final offering will depend on available funds)**

- 75% funding for synagogue membership (new or have not previously paid a membership fee to ANY congregation for 3+ years) for Year 1 and 50% for Year 2 for a new member
- 75% funding for SJCC membership (new or not previously a member for 3+ years) for Year 1 and 50% for Year 2 for a new member of the SJCC

### **Goals:**

- Incentivize participation in the excellence of Jewish life offered by synagogues and the SJCC to bring more people onto the Jewish Superhighway
- Strengthen Jewish organizations by helping them attract new members

### **Federation's Desired Return on Investment (ROI)**

- Minimum 20% more new members join all participating membership-based organizations than the previous year
- Minimum 70% of incentive grant recipients have a positive experience (as reported by grantees who distribute a simple and standard Federation survey to participants)
- Minimum 50% of incentive grant recipients report that they now are more likely to participate in other Jewish community events/activities (as reported by grantees who distribute a simple and standard Federation survey to participants)
- Minimum 45% of participants maintain their membership after the second year of participating in incentive grant for discounted rates

Note: recognizing that some congregations may deliver a higher ROI than others, the desired results are at 80% of participating congregations.

### **Who is eligible to apply?**

- Individuals living in Jewish homes in Ottawa
- Individuals not previously a member for 3+ years of the SJCC
- Any new members of a local Ottawa synagogue with a previously published annual membership fee) (new or not previously a member of ANY congregation for 3+ years). Not eligible are individuals already a member or switching from, one congregation to another

### **Eligibility requirements to be considered for funding**

- Individual requesting an incentive grant meets eligibility requirements
- Focused on the welcoming experience, participating organizations agree to undertake the following:
  - Personal welcoming call from a senior leader;
  - One invitation from a leader or volunteer for a personal interaction (e.g., coffee date, home-based Shabbat dinner, etc.) within 90 days of joining
  - SJCC/congregation agrees to administer the necessary survey and/or reporting requirements
  - If an organization misses desired ROI, may not be included in Year 2.

### **When can I/we apply?**

Incentive grants are provided on an ongoing basis for individuals (first come, first served basis). Participating organizations will confirm eligibility and submit for reimbursement quarterly.

Participating synagogues and the SJCC, will receive a minimum of 2-months to market and promote the program through different channels before its launch, and Federation will promote the unique value proposition of each organization.

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## **CONCLUSION**

When the Jewish Federation of Ottawa embarked on the 2019 Annual Campaign, the goal was to increase giving by a minimum of \$1 million to build the Jewish Superhighway.

Our generous donors ensured that we surpassed this goal. And in this respect, the strategic allocations task force ensures that the funds will be used specifically for the four outcomes of the Jewish Superhighway:

- Inspired Jewish Experiences for all ages;
- Enriched Jewish education and learning;
- Compassionate care for our most vulnerable; and
- A safe and secure community.

The additional funds raised in the Campaign will be used precisely as articulated in the Campaign message: for nimble, strategic funding that will seed innovation and build the capacity of organizations and individual lay leaders. The next step is communicating the exciting news around the RFPs and then allowing the creativity, passion, and ambitions of our community to shine.