

APPROVED
by JFO Board
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Jewish Federation of Ottawa

**Report of the Grants and Evaluation Committee
On Program Funding
2014/15 & 2015/16**



Submitted by
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Grants and Evaluation Committee

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Executive Summary

This report presents recommendations for the distribution of funds from the annual campaign to community programs for fiscal years 2014/15 and 2015/16.

Funding is granted to community programs that directly address the Jewish Federation's strategic objectives. By funding member agencies to carry out a variety of programming, the Federation can meet its objective of creating a strong, vibrant and inclusive Jewish community.

A total of **\$1,201,730** is available to be distributed to agencies for programs in 2014/15. Two year funding has been granted to programs based on the assumption that the same amount of funding will be available the following year, in 2015/16.

The Federation has increased the Program Funding Envelopes over last year's levels by \$55,000 for both 2014/15 and 2015/16. The largest envelope, Assisting the Vulnerable, has been increased by \$27,000 for both years. The Strengthening Community Envelope has been increased by \$20,000 for both years, and the Religious Outreach Envelope has been increased by \$8,000 for both years.

In addition, the Federation has moved \$43,500 into the Program Funding Envelope under Assisting the Vulnerable, that was previously part of another funding envelope. The Jewish Federation of Ottawa has historically provided aid to new Jewish immigrants through its support to Jewish Federations of Canada United Israel Appeal (UIA). UIA Canada has gradually downloaded its support of immigrant services to local Federations. As a result, moving forward, requests for funding to aid new immigrants will come through the Grants and Evaluation Committee along with other requests for program funding.

Funding for 2014/15 & 2015/16

Funding priorities of the Jewish Federation of Ottawa for 2014/15 and 2015/16 are framed in the following envelopes:

1. Assisting the Vulnerable Envelope
2. Strengthening Community Envelope
3. Religious Outreach Envelope

The Grants and Evaluation Committee received applications for funding for 37 programs representing 17 distinct agencies and organizations. All applicants attended face-to-face meetings with the Grants and Evaluation Committee. The committee then evaluated each application and submitted recommendations for funding to the Jewish Federation Board of Directors.

Issues Arising and Recommendations

During the current year's granting process, several issues and challenges emerged. The Grants and Evaluation Committee has developed the following recommendations to address these challenges:

Recommendation: Reinstate core funding to some agencies, in addition to continuing to provide program funding to local Jewish agencies. (See page 18)

Recommendation: Collapse the Religious Outreach Envelope and the Strengthening Community Envelope back into one envelope. (See page 18)

Recommendation: Change the timing of the Jewish Federation's application for funding process so agencies are notified about funding decisions sooner. (See page 19)

Introduction

The purpose of this report is to describe the granting process of the Jewish Federation of Ottawa and to set out the distribution of community funds to partner agencies and community organizations for two fiscal years, 2014/15 and 2015/16. This report excludes allocations to Jewish schools (information about school funding is available in a separate report).

Applications were reviewed by the members of the Grants and Evaluation Committee who are selected to represent a broad cross-section of members of the community. The members of the committee have previous experience volunteering or working within local Jewish organizations. Many also have experience with allocations processes in non-governmental organizations, with financial management and/or with program evaluation. Members were asked to declare any possible conflicts of interest and to abstain from evaluating applications where there was a stated conflict.

The Chair of the Grants and Evaluation Committee is Arlene Wortsman. The members of the committee are: Stuart Ages (Federation Board Representative), David Baker, Sharon Diamond, Brian Goldstein, Sye Mincoff, Susan Marcus, Deborah Saginur, Zelda Shore, Jessica Strauss, Harland Tanner, Mark Thaw (Federation Board Representative), Jordana Vered and Helen Zipes.

By funding programs and essential community services, the Federation strengthens the capacity of our partner agencies to address important needs in the community. The availability of resources, community priorities and strategic objectives, and the reflection of Jewish values are all factors taken into account in the Committee's recommendations.

As always, the Grants and Evaluation Committee faced a great challenge in deciding which of the many worthy programs to fund, and how to allocate limited funds in a way that maximizes the Federation's resources in order to meet community priorities. This year, additional funds were added to the funding envelopes and three organizations were granted funding for the first time.

Strategic Objectives of the Federation (as ratified by the Board in 2012)

OBJECTIVE 1. Increase the opportunity for meaningful points of contact for young people in the Ottawa Jewish Community.

OBJECTIVE 2. Fund and create opportunities to include newcomers, unaffiliated Jews and the vulnerable in the Ottawa Jewish community.

OBJECTIVE 3. Build effective partnerships among local Jewish agencies in order to increase inter-agency cooperation.

OBJECTIVE 4. Improve communication of Federation activities to Jewish and general community in order to increase awareness of the Federation and its partners.

OBJECTIVE 5. Enable and inspire community members with potential capacity, who make marginal or no contribution to the community or Annual Campaign, to increase their participation and commitment.

OBJECTIVE 6. Increase opportunities for the Ottawa Jewish community to build connections to Israel and Israelis.

OBJECTIVE 7. Ensure the continued vibrancy of the Jewish educational system in Ottawa, by supporting day and supplemental schools in their continuing quest for excellence.

Funding Envelopes

Funding priorities of the Jewish Federation of Ottawa for 2014/15 and 2015/16 are framed in the following envelopes:

1. Assisting the Vulnerable Envelope
2. Strengthening Community Envelope
3. Religious Outreach Envelope

1. Assisting the Vulnerable Envelope

This envelope provides funds for ongoing programs by or in partnership with organizations whose main beneficiaries are vulnerable members of the Jewish community. Funds in this envelope assist, among others:

- Individuals who need financial assistance due to insufficient income or unemployment
- Disabled individuals- whether their disability is physical, developmental, or psychiatric
- Seniors who are in need of financial assistance or assistance with daily tasks

The Grants and Evaluation Committee received 15 applications in this envelope, from 7 agencies. See Table 4 for a complete list of recommendations under Assisting the Vulnerable.

2. Strengthening Community Envelope

This envelope provides funds for ongoing non-denominational Jewish cultural, social, recreational and educational programs serving a broad range of beneficiaries. Priorities in this envelope include:

- Jewish identity- culture, education, recreation, Israel trips etc.
- Community leadership and volunteer development
- Adult education

In this envelope the committee received 13 applications from 7 agencies. See Table 5 for a complete list of recommendations under Strengthening Community.

3. Religious Outreach Envelope

This envelope provides funds for programs or projects delivered by religious organizations in our community. These programs reach out to various segments of the population, including the marginally affiliated. Their goal is to bring Judaism to life for the community.

In this envelope the committee received 9 applications from 6 agencies. See Table 6 for a complete list of recommendations under Religious Outreach.

Granting Process

Timeline

- All beneficiary and member agencies were notified of the start of the funding process in early October 2013. The deadline for submission was November 22, 2013. All information about the funding process and application forms were available on-line and agencies had to submit applications on-line which was new for this funding cycle.
- Two information and training sessions were provided to explain the new on-line applications process. These sessions were provided in October 2013.
- Hands-on assistance and technical support were provided to agencies upon their request, to assist in completing applications for funding throughout October and November. Technical support was available throughout the applications and submissions process.
- Applications were reviewed thoroughly by staff and committee members from November 2013 through February 2014.
- Face to face meetings with agencies were held in January. This provided an opportunity for agencies to highlight important aspects of their applications and for Grants and Evaluation Committee members to ask any questions that might have arisen.
- The funding recommendations were submitted to the Board for approval May 21, 2014.
- Funding letters to partner agencies are distributed in late May 2014.

Decision Making Process

The Grants and Evaluation Committee was divided into three sub-committees which were in line with the Federation's funding envelopes. This structure increased the efficiency of the process and enabled the sub-committees to share the work of reading and evaluating the large amount of information provided by agencies about their programs. Each sub-committee had 3 or 4 members plus a Chair. The sub-committees were:

- Strengthening Community: Community, Adults and Seniors
- Strengthening Community: Children, Youth and Young Adults
- Assisting the Vulnerable

The Strengthening Community Envelope was divided between two sub-committees because this envelope has historically received the majority of applications.

Requests for program funding that fall within the Religious Outreach Envelope cross over all the sub-committees, and were adjudicated by the appropriate sub-committee.

The following criteria were the main focus of the deliberations of the sub-committees:

- Does the program fit into community planning priorities?
- Does the program or service meet an ongoing and documented community need?
- Is it a service that is already being offered in the community?
- Does the program have measurable, achievable goals, and a realistic budget?
- Are the agency's plans to assess the impact and expected outcomes of the program clear and practical?
- Is the program accessible to all parts of the community?
- Does it involve collaboration with other agencies in order to make the best use of community dollars?
- Is the program viable based on its plan for implementation and can it sustain itself with additional sources of income beyond that of the Federation?

Grants and Evaluation Committee-Agency Meetings

The Grants and Evaluation Committee met in January 2014 with each of the applying agencies. Some areas of interest to the committee included: the objectives of the program; program targets and number of people served by the program; program budget; understanding the deployment of staff and overhead costs; alternative sources of revenue and the sustainability of a program if it were not to receive full requested funding; and the challenges facing agencies and plans they have to address their challenges.

Program-Based Funding

A program is defined as an activity or set of activities designed to achieve results in meeting specific community needs. While the funding awarded is meant to address specific programs and not underwrite agencies on the basis of their operating budgets, many agencies also have access to funding from other sources. Agencies using funds from other sources to support a particular program must report the income as part of their application to the Federation for that program. At the same time, organizations can also include a reasonable portion of their overhead as a part of the cost of an individual program. However it has been suggested by several agencies that we consider reintroducing some aspect of core funding.

Finance and Audit Committee Function

As a regular part of the granting process, funded agencies are subject to review not only by the Jewish Federation's Grants and Evaluation Committee, but also by the Finance and Audit Committee. Through this process, the Federation is doing its due diligence to ensure that funded agencies are complying with the *Obligations and Responsibilities of Funded Agencies*, as laid out in the Handbook for Agencies.

Organizations that do not comply with the *Obligations and Responsibilities of Funded Agencies* will not be eligible for Federation funding until they can demonstrate that they are working to meet compliance requirements. It is the intention of the Federation to work collaboratively with agencies that fall short in certain areas of compliance, to assist them to succeed in meeting their obligations.

Measuring the Impact of Funded Programs

Funded agencies are held accountable for how they use Federation funding. In order for funded agencies to receive the second year of funding, they must demonstrate that they have successfully met their objectives for year one. If they have not met their objectives as outlined in their application for funding, they must explain why and be able to demonstrate that they have a plan in place to move forward with their program in order to still receive their second year of funding.

One of the ways that agencies report on their program activities is through an annual evaluation report. This report asks funded agencies to describe the results they have achieved and how well these match up to the goals and objectives they set for their program during the application process. Agencies are asked to report on metrics used in their Program Logic Model including how many people they have impacted and in what ways they have been impacted.

In addition to the evaluation report, the Committee hears directly from agencies about their programs and how they view their impact in the community in face-to-face meetings and site-visits. The goals of the visits are to help committee

members develop a deeper understanding of what agencies do, and the impact that Federation funded programs have on the people they serve. The purpose of this is to be able to communicate this improved understanding to the Federation Board, to our donors and to the community at large. Site visits provide the committee with insight into the complexities of funded organizations, their opportunities and challenges, and most importantly build a stronger relationship between the agencies and the Federation so that we can work better together as partners.

Recognition of Federation Support

As a condition of receiving funding from the Federation, agencies must agree that they will publicize Jewish Federation support on all publicly distributed materials related to programs that received funding. This includes mention on their website and in their annual report.

Allocations Decisions

The Grants and Evaluation Committee makes recommendations for program funding to the Federation Board of Directors. The Board makes the final funding decisions. The decisions of the Board are final; there is no process for appeals.

Envelope Sizes

The total amount available for distribution through the allocations process in 2014/15 is \$1,201,730 and the projection for the following year, 2015/16, is the same.

The Federation has increased the Program Funding Envelopes over last year's levels by \$55,000 for both 2014/15 and 2015/16. The largest envelope, Assisting the Vulnerable, has been increased by \$27,000 for both years. The Strengthening Community Envelope has been increased by \$20,000 for both years, and the Religious Outreach Envelope has been increased by \$8,000 for both years.

In addition, the Federation has moved \$43,500 into the Program Funding Envelope under Assisting the Vulnerable, that was previously part of another funding envelope. The Federation of Ottawa has historically provided aid to new Jewish immigrants through its support to Jewish Federations of Canada United Israel Appeal (UIA). UIA Canada has gradually downloaded its support of immigrant services to local Federations. As a result, the Federation informed Jewish Family Services in January 2013 that starting in 2014/15, they would have to apply for funding for aid to new immigrants through the Federation's program funding process. Jewish Family Services submitted an application for funding to aid new immigrants in this funding cycle, and the funding decisions are outlined in Table 4 below.

Table 1: Envelope Sizes 2014/15 and 2015/16

Envelope	Total Grants Available Last Year 2013-2014	Total Available to Allocate 2014/15	Total Available to Allocate 2015/16
Assisting the Vulnerable	\$ 686,080	\$ 756,580	\$ 756,580
Strengthening Community	\$ 368,500	\$ 388,500	\$ 388,500
Religious Outreach	\$ 48,650	\$ 56,650	\$ 56,650
Totals:	<u>\$ 1,103,230</u>	<u>\$ 1,201,730</u>	<u>\$ 1,201,730</u>

Outcomes

Table 2: Number of Applications by Envelope

Assisting the Vulnerable	Strengthening Community	Religious Outreach	Total Programs Submitted	Total Agencies
15	13	9	37	17

Assisting the Vulnerable

Table 4 below contains the Committee's recommendations for the funding of programs in the Assisting the Vulnerable envelope.

Table 4: Assisting the Vulnerable

Applicant	Program	Funding Received 2013/14	Funding Requested 2014/15	Recommendation 2014/15	Recommendation 2015/16
AJA 50+	Creative Connections	\$2,400	\$7,000	\$3,000	\$3,000
Camp B'nai Brith	Camper Scholarships	\$20,000	\$96,000	\$22,000	\$22,000
Hillel Lodge	Enhanced Nursing	\$100,000	\$130,000	\$100,000	\$100,000
Hillel Lodge	Feeding Program	\$28,000	\$36,000	\$30,000	\$30,000
Hillel Lodge	Kosher Food	\$70,000	\$100,000	\$71,000	\$71,000
Hillel Lodge	Special Rehab Nurse	-	\$22,000	\$20,000	\$20,000
SJCC	Subsidies	\$65,880	\$60,880	\$60,880	\$60,880
Jewish Family Services	School Counselling Services	\$20,000	\$47,000	\$21,000	\$21,000
Jewish Family Services	Seniors Support	\$70,000	\$80,000	\$71,000	\$71,000
Jewish Family Services	Tikvah Program	\$238,000	\$473,440	\$239,200	\$239,200
Jewish Family Services	Jewish Immigrant Aid	**	\$59,000	\$42,500	\$42,500
Tamir	Keshet for kids	\$14,800	\$21,862	\$16,000	\$16,000
Tamir	Residential Outreach	\$15,000	\$25,320	\$17,000	\$17,000
Tamir	Judaic Outreach	\$42,000	\$47,185	\$43,000	\$43,000
Machson Tzvi Hersh	Religious Outreach	-	\$5,000	-	-
Totals:		\$ 686,080		\$756,580	\$756,580

** The Jewish Federation of Ottawa has historically provided funding for aid to Jewish new immigrants through its support of Jewish Federations of Canada – United Israel Appeal (UIA). UIA Canada has gradually downloaded its support of immigrant services to local Federations. As a result, the Federation informed Jewish Family Services in January 2013 that starting in 2014/15, they would have to apply for funding for aid to new immigrants through the Federation's program funding process. Leading up to this change, in 2013/14, Jewish Family Services received from the Jewish Federation of Ottawa \$328,000 in program funding, and \$43,750 was provided separately to support new immigrants.

Strengthening Community

Table 5 below contains the Committee's recommendations for the funding of programs in the Strengthening Community Envelope.

Table 5: Strengthening Community

Applicant	Program	Funding Received 2013/14	Funding Requested 2014/15	Recommendation 2014/15	Recommendation 2015/16
AJA 50+	AJA50+	\$8,000	\$14,000	\$10,000	\$10,000
Hillel Ottawa	Jewish Life on Campus	\$42,500	\$46,750	\$46,750	\$46,750
The OJCS	Washington Holocaust Trip	\$3,000	\$5000	\$1,000*	-
Sephardi Assoc. of Ottawa	Sephardi programming	\$7,000	\$21,500	\$8,000	\$8,000
Limmud Ottawa	Jewish Cultural and Educational Conference	-	\$1,000	\$1,000	\$1,000
SJCC	Library	\$24,000	\$24,000	\$20,000	\$20,000
SJCC	Community Events	\$16,000	\$16,000	\$16,500	\$16,500
SJCC	Adult Cultural Programs	\$20,000	\$20,000	\$20,000	\$20,000
SJCC	Ganon	\$20,000	\$20,000	\$20,000	\$20,000
SJCC	Summer Camp	\$20,000	\$20,000	\$23,000	\$23,000
SJCC	Youth and Teen Programs	\$18,000	\$18,000	\$18,500	\$18,500
SJCC	Building Funding	\$190,000	\$275,428	\$195,000	\$195,000
Developing Future Leaders	Student Interns Program	-	\$10,000	\$2,200	\$2,200
	Totals:	\$368,500		\$381,950	\$380,950

*The OJCS Washington Holocaust Trip: The Grants and Evaluation Committee recommends phasing out funding for this program. The OJCS receives separate funding from the Federation to operate the school from the School Funding Envelope.

The Grants and Evaluation Committee has made the recommendation that \$6,550 of the unallocated funds in the Strengthening Community Envelope be moved to the Religious Outreach Envelope to support several programs, as outlined below.

Religious Outreach

Table 6 below contains the Committee's recommendations for the funding of programs in the Religious Outreach Envelope.

Table 6: Religious Outreach

Applicant	Program	Funding Received 2013/14	Funding Requested 2014/15	Recommendation 2014/15	Recommendation 2015/16
Acheinu Jewish Russian Education Centre	Shabbat and Holidays Program	-	\$7,000	-	-
Chabad Student Network	Holiday Awareness for Students on Campus		\$20,000	\$2,400	\$2,400
JET	Adult Education	\$7,650	\$12,000	\$8,000	\$8,000
JET	JWRP Post-Trip Programming	-	\$15,000	\$2,000	\$2,000
JET	Jewish Young Professionals	\$10,000	\$27,000	\$13,000	\$13,000
Ottawa Torah Centre	Living Legacy	\$7,000	\$10,000	\$8,000	\$8,000
Ottawa Torah Centre	JLI Courses	\$3,000	\$5,000	\$2,000	\$2,000
Jewish Youth Library	Friendship Circle	-	\$40,000	\$4,400	\$4,400
NCSY	Jewish Culture Clubs	\$19,000	\$30,000	\$24,200	\$24,200
	Totals:	\$46,650		\$64,000	\$64,000

The Grants and Evaluation Committee has made the recommendation that \$6,550 of the unallocated funds in the Strengthening Community Envelope be moved to the Religious Outreach Envelope to enable support to programs, as outlined above. Additionally, there was \$48,650 available to allocate last year in 2013/14, and only \$46,650 was dispersed. This resulted in a \$2,000 surplus which the Grants and Evaluation Committee is recommending be divided equally between the 2014/15 and 2015/16 Religious Outreach Envelope. The total size of the Religious Outreach Envelope is therefore \$64,200 for both 2014/15 and 2015/16.

**Table 7: Total Amounts Recommended for Disbursement by Agency for
2014/15 – 2015/16**

Agency	Last Year's Funding 2013/14	Proposed Funding		Funding By Envelope 2014/15		
		Proposed 2014/15	Proposed 2015/16	Assisting The Vulnerable	Strengthening Community	Religious Outreach
AJA 50+	\$10,400	\$13,000	\$13,000	\$3,000	\$10,000	
Camp B'nai Brith	\$20,000	\$22,000	\$22,000	\$22,000		
Chabad Student Network	-	\$2,400	\$2,400			\$2,400
Developing Future Leaders	-	\$2,200	\$2,200		\$2,200	
Hillel Ottawa	\$42,500	\$46,750	\$46,750		\$46,750	
Hillel Lodge	\$198,000	\$221,000	\$221,000	\$221,000		
Jewish Youth Library	-	\$4,400	\$4,400			\$4,400
Ottawa Torah Centre**	\$10,000	\$10,000	\$10,000			\$10,000
JET	\$17,650	\$23,000	\$23,000			\$23,000
Jewish Family Services*	\$43,750+ \$328,000	\$373,700	\$373,700	\$373,700		
Limmud	-	\$1,000	\$1,000		\$1,000	
NCSY**	\$19,000	\$24,200	\$24,200			\$24,200
SJCC	\$373,880	\$373,880	\$373,880	\$60,880	\$313,000	
Sephardi Assoc.	\$7,000	\$8,000	\$8,000		\$8,000	
Tamir	\$71,800	\$76,000	\$76,000	\$76,000		
OJCS** Washington Trip	\$3,000	\$1,000	-		\$1,000	
Totals:	\$1,144,980	\$1,202,530	\$1,201,530	\$756,580	\$381,950	\$64,000

*Jewish Family Services received \$328,000 in Program Funding in 2013/14. \$43,750 was provided separately to support new immigrants.

** The Ottawa Torah Centre (OTC), NCSY/Torah High and the Ottawa Jewish Community School (OJCS) receive school funding from the Federation. The OJCS's school funding in 2014/15 remains at the same level as last year. OTC's school funding increased and NCSY's modestly decreased over last year. Please see School Funding Report for full details.

Table 8: Total Amounts Recommended for Disbursement by Program for 2014/15 and 2015/164

Agency	Program	Envelope	Proposed Year 1	Proposed Year 2	Agency Total Year 1
AJA 50+	Creative Connections	Vulnerable	\$3,000	\$3,000	
	Programming for adults 50+	Community	\$10,000	\$10,000	
AJA 50+					\$13,000
Camp B'nai Brith	Scholarships	Vulnerable	\$22,000	\$22,000	
Camp B'nai Brith					\$22,000
Chabad Student Network	Holiday Awareness for Students on Campus	Outreach	\$2,400	\$2,400	
Chabad Student Network					\$2,400
Developing Future Leaders	Student Interns Program	Community	\$2,200	\$2,200	
Developing Future Leaders					\$2,200
Hillel Ottawa	Programming on University Campuses	Community	\$46,750	\$46,750	
Hillel Ottawa					\$46,750
Hillel Lodge	Enhanced Nursing	Vulnerable	\$100,000	\$100,000	
	Feeding Program	Vulnerable	\$30,000	\$30,000	
	Kosher Food	Vulnerable	\$71,000	\$71,000	
	Special Rehab Nurse	Vulnerable	\$20,000	\$20,000	
Hillel Lodge					\$221,000
Jewish Youth Library	Friendship Circle	Outreach	\$4,400	\$4,400	
Jewish Youth Library					\$4,400
Ottawa Torah Centre	JLI Courses	Outreach	\$8,000	\$8,000	
	Living Legacy	Outreach	\$2,000	\$2,000	
Ottawa Torah Centre					\$10,000
JET	Adult Education Classes	Outreach	\$8,000	\$8,000	
	JWRP Post-Trip Programming	Outreach	\$2,000	\$2,000	
	Jewish Young Professionals	Outreach	\$13,000	\$13,000	
Jewish Education Through Torah (JET)					\$23,000
Jewish Family Services	Student Support Program	Vulnerable	\$21,000	\$21,000	
	Seniors Support	Vulnerable	\$71,000	\$71,000	
	Tikvah Program	Vulnerable	\$239,200	\$239,200	
	Jewish Immigrant Aid	Vulnerable	\$42,500	\$42,500	
Jewish Family Services					\$373,700

Agency	Program	Envelope	Proposed Year 1	Proposed Year 2	Agency Total Year 1
SJCC	Subsidies	Vulnerable	\$60,880	\$60,880	
	Ganon	Community	\$20,000	\$20,000	
	Summer Camp	Community	\$23,000	\$23,000	
	Youth and Teen Programs	Community	\$18,500	\$18,500	
	Library	Community	\$20,000	\$20,000	
	Adult Cultural Programs	Community	\$20,000	\$20,000	
	Community events	Community	\$16,500	\$16,500	
	Building	Community	\$195,000	\$195,000	
Soloway JCC					\$373,880
Limmud	Limmud Conference	Community	\$1,000	\$1,000	
Limmud					\$1,000
NCSY	Culture Clubs	Outreach	\$24,200	\$24,200	
NCSY					\$24,200
Sephardi Association	Sephardi programming	Community	\$8,000	\$8,000	
Sephardi Association of Ottawa					\$8,000
Tamir	Keshet	Vulnerable	\$16,000	\$16,000	
	Residential Outreach	Vulnerable	\$17,000	\$17,000	
	Judaic Outreach	Vulnerable	\$43,000	\$43,000	
Tamir					\$76,000
OJCS	Holocaust Studies Trip	Community	\$1,000	-	
The OJCS (Ottawa Jewish Community School)					\$1,000
Totals:			\$1,201,830	\$1,200,830	\$1,201,830

Update on Last Year's Recommendations

In past years, the Jewish Federation Board has approved many of the Grants & Evaluation Committee's recommendations for change. The following is an update on the recommendations from the last funding cycle.

The Jewish Federation of Ottawa should facilitate better collaboration among local Jewish agencies.

The Grants and Evaluation Committee continues to recommend, as it has in the past, that the Jewish Federation use incentives to more strongly encourage meaningful partnerships that will be mutually beneficial to agencies.

One of the ways that the Jewish Federation has undertaken to meet this objective is through the new Fund for Innovative Capacity Building. This new donor-directed fund will support innovative projects among Federation's funded

agencies that help build capacity and/or strengthen services through a one-time cash injection that is aimed at helping to improve operations over the long-term. This fund will support initiatives that strengthen funded agencies, with an emphasis on collaborative approaches that benefit multiple agencies. Grants of up to \$15,000 will be awarded in 2014 and again in 2015.

The Grants and Evaluation Committee also recommended last year that the Federation undertake an active role in helping to facilitate collaboration and cooperation among the various Jewish organizations and agencies. In 2014, the Federation brought together the leaders of all local Federation funded agencies in order to strengthen relationships among the agencies and to promote increased collaboration. Regular meetings of agency executive directors will continue. As well, an effort is being made on the part of the Federation to improve communication with and among agencies. The redesigned e-newsletter is one of the tools used to help promote coordination and communication among all community agencies, and this has been increased from once a month to a bi-monthly e-newsletter.

The Innovations Funding Envelope should be re-instated.

In 2009, in response to a decrease in funds available to allocate, the Board of Directors of the Jewish Federation decided to cancel the Innovations Fund in order to ensure that it could continue to support and sustain the programs and services that were already established. The Grants and Evaluation Committee recommended last year that the Jewish Federation re-establish innovation funding in order to allow for new projects that are responding to new and emerging needs of the community to get off the ground and have a chance to develop. The launch of a New Fund for Innovative Capacity Building in March 2014, will help to address this need in the community. Thanks to a generous donor, the new fund will support innovative projects that build capacity in our partner Jewish agencies by injecting up to \$100,000 into agencies in 2014/15, with another \$50,000 available in 2015/16.

The Jewish Federation also promotes innovation in the Jewish community through its Micro-Grants program. This program provides grants of up to \$2,000 to individuals or organizations that meet specific criteria and target Jewish young adults aged 18 to 45. The Micro-Grants program is a partnership between the Jewish Federation of Ottawa, the Ottawa Jewish Community Foundation and private donors that provides grants with a quick turn-around time of fourteen days. Applications are accepted throughout the year for unique programs with Jewish content that require seed money to get started.

The Grants and Evaluation Committee should undertake to improve its audit function to better evaluate the impact that funding has in the community.

Over the past number of years the Jewish Federation and the Grants and Evaluation Committee have been working to improve the way the impact of Federation funding in the community is measured. The Jewish Federation and the Grants and Evaluation committee have taken positive steps in the past few years toward improving the audit function through several initiatives that include: the adoption of the logic model application form; integrating the application and evaluation forms; and moving all agencies through the granting process at once so that in the second year of the 2 year cycle the committee can turn its attention to program review.

In spring 2013, the Grants and Evaluation Committee for the first time held site visits with all funded agencies. The goals of the face-to-face meetings were to help committee members develop a deeper understanding of what the agencies do and the impact that Federation funded programs have on the people they serve; to help committee members understand more about the complexities of funded organizations, their opportunities and challenges; and to build a stronger relationship between the agencies and the Jewish Federation so that we can continue to improve the way we work together as partners.

The Grants and Evaluation Committee plans to hold site visits of funded agencies in spring of 2015 to continue the process of understanding funded agency's programs and the impact that Federation funding is having in the community. Improving the way we measure the impact of Federation funding in the community continues to be a work in progress.

Issues Arising and Recommendations

In past years, the Federation has approved many of the Grants and Evaluation Committee recommendations for change and improvement. During the current granting process, several issues and challenges have emerged. The following are the committee's recommendations that spring from these issues.

Recommendation: *Reinstate core funding to some agencies, in addition to continuing to provide program funding to local Jewish agencies.*

Over the past decade, the Federation has moved away from core funding (with the exception of the SJCC which receives core funding to "maintain a non-denominational community centre"). It has become evident that if the Federation wants to be responsive to the needs of our community agencies, that it needs to develop a more nuanced approach to funding which would include both program and some core funding, in certain cases.

Without undermining the positive steps that the Grants and Evaluation Committee and the Jewish Federation have undertaken to make the allocations process more transparent and efficient through its move to funding programs, the Committee together with the Federation Board should discuss possible ways to

re-introduce a limited amount of core funding for specific agencies that provide essential services to the Jewish community.

Recommendation: *Collapse the Religious Outreach Envelope and the Strengthening Community Envelope back into one envelope.*

In March 2009, The Federation was faced with a budget shortfall and decided to make changes to the allocation process to deal with its financial realities. After careful consideration of numerous possibilities, the Board decided to implement a variety of changes that included reducing all the allocations envelopes by three to five percent, eliminating the Outreach and Innovations Envelopes as well as the Award of Excellence, and imposed a moratorium on funding for new programs until the Federation's financial capacity improved. Another decision of the Board at that time was to create a separate funding envelope for programs delivered by religious outreach organizations, and to reduce the funding for all programs categorized as "religious outreach" by 50%.

In the past two funding cycles, the Federation has experienced a surplus of funding in the Strengthening Community Envelope while witnessing a growth in the number of applications and amount of funding requested from religious outreach organizations. In the past two funding cycles, the Grants and Evaluation Committee has recommended shifting the surplus funds in the Strengthening Community Envelope to the Religious Outreach Envelope to meet these additional needs. Now the Committee is recommending that all organizations involved in strengthening Jewish identity be adjudicated together, and funded from one Strengthening Community Envelope.

Recommendation: *Change the timing of the Jewish Federation's application for funding process so agencies are notified about funding decisions sooner.*

Federation program funding decisions are currently made by the Board at its May board meeting. For agencies whose fiscal year starts July 1, there is little time to plan for the coming year. By moving up the Federation's decision making process, agencies will learn about the funding decisions earlier. This will enable agencies to better plan ahead.

Conclusion

In 2014, the Federation undertook a strategic planning process which culminated in a new strategic plan that will guide the work of the organization for the next few years. One of the objectives outlined in the new plan is to undertake a full review of the Federation's process for funding local agencies and organizations. The goal is to complete this review and implement any changes by the next funding cycle which will begin in fall 2015.

The Grants and Evaluation Committee would like to recognize the large amount of time and resources that the lay and professional leadership within community organizations and agencies devote to the application process, which may or may not result in substantial funding for their programs. Each program that applies for funding is impressive in its own way and adds flavor to the Ottawa Jewish community. The community is fortunate to have so many dedicated and creative individuals and organizations who offer a wide range of programming opportunities for people of all ages and from all walks of life.

The Jewish Federation would like to extend its sincere thanks to the many volunteers who make the grants and evaluation process and many other Federation activities possible.