

JEWISH FEDERATION OF OTTAWA
REPORT ON FUNDING TO LOCAL AGENCIES
FOR 2018/19 & 2019/20

REPORT CONTENTS

1. INTRODUCTION
 2. REPORT HIGHLIGHTS
 3. PROGRAM FUNDING
 4. ORGANIZATIONAL FUNDING
 5. SUMMARY OF ALL FUNDING RECOMMENDATIONS
 6. NEXT STEPS
- APPENDIX 1: Criteria for funded agencies
APPENDIX 2: Obligations of program funded agencies

1. INTRODUCTION

This report presents recommendations for the distribution of funds from the Annual Campaign to community organizations for fiscal years 2018/19 and 2019/20. By funding partner agencies to carry out a variety of programming, the Federation can meet its objectives of creating an inclusive, accessible, educated, and engaged Jewish community. Information about school funding is available in a separate report.

As introduced in last round of funding, the committee reviewed funding using a Hybrid Model of Funding that sees the largest five agencies receive Organizational Funding and all other organizations receive Program Funding.

The Grants Committee's funding recommendations take into consideration that the amount of funding available for agencies from the Annual Campaign remains the same as in the last round of funding.

2. REPORT HIGHLIGHTS

- Two new applications for funding were received: OTC applied for funding for a new teen initiative, and the Zelikovitz Centre applied for funding for their Holocaust education initiatives. Both of these agencies already receive Federation funding for other programs.
- The Grants Committee recommends no changes to currently funded agencies for 2018/19 and 2019/20. This is due to the fact that the amount of dollars available to allocate remains unchanged. Therefore, no new funding should be allocated to new programs of already funded agencies at this time.
- The Grants Committee recommends moving Or Hanesamah's *Machaneh Shabbat* from the School Funding Envelope into the Program Funding Envelope. In light of this, the committee recommends allocating an additional \$1,000 to the Strengthening Community Envelope to fund *Machaneh Shabbat* for the next 2 years.

3. PROGRAM FUNDING

Federation provides grants for local programs that help to fulfill its mandate: Building Community, Helping the Vulnerable, Educating Jewishly and Supporting Israel.

Program Funding is awarded to address specific programs and not underwrite agencies on the basis of their operating budgets. At the same time, organizations can also include a reasonable portion of their overhead as a part of the cost of an individual program.

A total of 19 applications were received from 12 agencies. Applications were reviewed by the members of the Grants and Evaluation Committee who were 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, 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 and Federation Board Representative was Harold Feder. The members of the committee were: David Baker, Sharon Diamond, Harland Tanner, Joel Deiner, Nathan Clein, Aryeh Stegenga, Donna Klaiman, Helen Braiter, Jonah Rabinovitch, Rimma Pilat-Riches, and Helen Zipes.

Program Funding decisions are made based on the following criteria:

Full details of the criteria are listed in Appendix 1.

- a) Program fit with Federation priorities
- b) Program design and management
- c) Program impact

In order to complete the applications process, agencies must agree in writing to a list of commitments that are included in Appendix 2.

Timeline

- All beneficiary and member agencies were notified of the start of the funding process in August 2017. The deadline for submission was September 30, 2017. All information about the funding process and application forms were available on-line and agencies had to submit applications on-line.
- Hands-on assistance and technical support were provided to agencies upon their request, to assist in completing applications.
- Applications were reviewed thoroughly by staff and committee members from November 2017 through January 2018.
- Face-to-face meetings with applicant agencies were held in December. 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 will be submitted to the Board for initial approval in February/March 2018. Once Federation’s budget for 2018/19 is approved by the Board in the spring, agencies will be notified of their exact funding.

Measuring the Impact of Funded Programs

Funded agencies are held accountable for how they use Federation funding through an annual Impact Report. Funded agencies are asked 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 required to submit Financial Statements and Program Budgets, and are asked to report on how many people they have impacted and in what measurable ways they have been impacted.

In addition to the Impact Report, the Committee hears directly from agencies about their programs through face-to-face meetings and site-visits. The goals of the meetings 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. This also provides a forum to explore collaboration opportunities among agencies and between agencies and Federation. Most importantly, these meetings build a stronger relationship between the agencies and the Federation so that we can work better together as partners.

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.

Under the current Hybrid Funding Model, some agencies will receive Program Funding, while the 5 largest agencies will receive Organizational Funding. Note that funding for all agencies will come from the envelopes listed below, with the exception of the Ottawa Jewish Community School (OJCS) and other schools, whose funding comes from the School Funding Envelope.

Funding Envelopes

Funding Envelopes				
Funding Envelopes	Current 2017-2018	(\$) Increase	Proposed 2018/19	Proposed 2019/20
Strengthening Community	\$ 475,050	\$1,000	\$ 476,050	\$ 476,050
Assisting the Vulnerable	\$ 787,278	\$0	\$787,278	\$787,278
Total:	\$1,262,328	\$1,000	\$1,263,328	\$1,263,328

Proposed Program Funding

The Grants and Evaluation committee recommends moving Or Haneshamah’s *Machaneh Shabbat* into the Program Funding Envelope. Currently *Machaneh Shabbat* receives funding from the School Funding Envelope, however in practice the program shares more commonalities with “programs” than it does

with a formal school. An example of this is the family-oriented nature of the program, and the fact that the program is open to congregational members and not limited to school aged children. In light of this, the committee recommends moving \$1,000 in funding from the Schools Envelope to the Strengthening Community Envelope to fund *Machaneh Shabbat* for the next 2 years (\$1,000 per year).

Additional funding for the two **new** program applications is not recommended at this time: OTC is able to take advantage of Federation’s new Teen Grants that will provide funding for teen initiatives; in terms of the Zelikovitz Centre application for funding for Holocaust education, Federation currently invests \$7,000 per year in Holocaust education (and additional funds are designated on an annual basis from the Ottawa Jewish Community Foundation to support the work of Federation’s Shoah Committee) so the committee did not recommend funding this application.

Should financial circumstances change and additional funds become available, the committee did develop funding recommendations to address any increase. These recommendations could be made available to the Board should the need arise.

Program Funding: Strengthening Community Funding Recommendations				
Applicant	Program	Current Funding 2017/18	Requested Funding	Recommendation 2018/19 & 2019/20
AJA	AJA 50+	\$10,000	\$10,000	\$10,000
CSN	Holiday Programming	\$3,500	\$20,000	\$3,500
Hillel Ottawa	Student Campus Life	\$51,000	\$65,000	\$51,000
JET	Adult Education	\$9,000	\$15,000	\$9,000
JET	Sarah’s Tent	\$3,000	\$10,000	\$3,000
JET	Glebe Shul	\$15,000	\$50,000	\$15,000
JYL	Jewish Montessori Preschool	\$3,000	\$25,000	\$3,000
Limmud	Limmud Ottawa	\$2,000	\$4,000	\$2,000
NCSY	Culture Clubs	\$24,200	\$24,200	\$24,200
Or Haneshama	Machaneh Shabbat	\$0	\$1,000	\$1,000
OTC	JLI Courses	\$3,000	\$4,500	\$3,000
OTC	Living Legacy	\$10,000	\$10,000	\$10,000
OTC	C-Teen	\$0	\$4,500	\$0
Sephardi Association	Sephardi Programming	\$9,000	\$15,000	\$9,000
Zelikovitz Centre	DFL Student Interns	\$3,500	\$3,500	\$3,500
Zelikovitz Centre	Holocaust Program	\$0	\$2,000	\$0
	TOTAL:	\$145,200	\$263,700	\$147,200

Program Funding: Assisting the Vulnerable Funding Recommendations				
Applicant	Program	Current Funding 2017/18	Requested Funding 2018/19	Recommendation 2018/19 & 2019/20
AJA 50+	Creative Connections	\$ 3,000	\$ 3,000	\$ 3,000
Camp B'nai Brith	Camper Scholarships	\$ 22,000	\$ 130,000	\$ 22,000
Jewish Youth Library	Friendship Circle	\$ 4,400	\$ 4,400	\$ 4,400
TOTAL:		\$ 29,400	\$ 137,400	\$ 29,400

4. ORGANIZATIONAL FUNDING

Organizational Funding is provided to Federation’s five largest beneficiary agencies – Jewish Family Services, Hillel Lodge, Tamir, SJCC, and OJCS. Instead of having an annual application form, the 5 agencies each has a **“Tailored Accountability Agreement”** which lays out the commitments and conditions of funding.

In a collaborative process between the agencies and the Grants Committee, each Funding Agreement is reviewed every 2 years. Additionally, Federation’s finance committee will undertake an analysis of each of the agencies every 2nd year.

Annually, the core funded agencies are expected to submit their Annual Report, audited financial statements, and a written compliance report (based on the “Tailored Accountability Agreement”) of their activities. In addition, the Grants Committee will be meeting face-to-face with each of these agencies in the non-review year to receive an update about the agency’s progress, successes and challenges. The committee will meet with each agency to review the new agreement in the coming weeks.

Organizational Funding: Recommendations			
Agency	Current Funding 2017/18	Recommendation 2018/19 & 2019/20	Funding Envelope
SJCC	\$ 384,667	\$ 384,667	Strengthening & Vulnerable
Tamir	\$ 86,787	\$ 86,787	Assisting the Vulnerable
Hillel Lodge	\$ 231,787	\$ 231,787	Assisting the Vulnerable
JFS	\$ 384,487	\$ 384,487	Assisting the Vulnerable
OJCS	\$554,526	\$554,526	School Funding Envelope

5. SUMMARY OF ALL FUNDING RECOMMENDATIONS

By Agency	Current Funding 2017/18	Recommendation 2018/19 & 2019/20	Funding Envelopes	
			Assisting The Vulnerable	Strengthening Community
AJA 50+	\$13,000	\$13,000	\$3,000	\$10,000
Camp B'nai Brith	\$22,000	\$22,000	\$22,000	
Chabad Student Network	\$3,500	\$3,500		\$3,500
Zelikovitz Centre	\$2,500	\$2,500		\$2,500
Hillel Ottawa	\$51,000	\$51,000		\$51,000
Hillel Lodge	\$231,787	\$231,787	\$231,787	
JET	\$27,000	\$27,000		\$27,000
Jewish Family Services	\$384,487	\$384,487	\$384,487	
Jewish Youth Library	\$7,400	\$7,400	\$4,400	\$3,000
Limmud	\$2,000	\$2,000		\$2,000
NCSY	\$24,200	\$24,200		\$24,200
Or Hanehama	\$0	\$1,000		\$1,000
Ottawa Torah Centre	\$13,000	\$13,000		\$13,000
Sephardi Association	\$9,000	\$9,000		\$9,000
SJCC	\$384,667	\$384,667	\$54,817	\$329,850
Tamir	\$86,787	\$86,787	\$86,787	
Totals:	\$1,262,328	\$1,263,328	\$787,278	\$476,050

6. NEXT STEPS

Once funding recommendations are approved by Federation's Board in February/March, agencies will be notified of their funding for the next budget year, pending final approval by the Board of the budget in May. Approved funding will be available to agencies starting July 1, 2018.

APPENDIX 1

Program Funding decisions are made based on the following criteria:

- a) Program fit with Federation priorities
 - The program supports Federation’s objectives laid out in its strategic plan.
 - The applicant agency has a mission and vision that is in line with the Federation’s mission and vision.

- b) Program design and management
 - The program budget is realistic and the agency has a track record of good financial management and efforts at controlling costs.
 - The program has clear objectives and the agency can demonstrate specific, measurable and attainable objectives.
 - The agency has clear and practical plans to assess the impact and expected outcomes of the program.
 - The program is viable based on its plan for implementation and can sustain itself with additional sources of income beyond that of the Federation.
 - The agency running the program is amenable to collaborating with other organizations in order to make the best use of community dollars.

- c) Program impact
 - The program provides “bang for the buck” and its impact is in line with the amount of funding being requested (recognizing that certain programs and services cost more to deliver than others).
 - The program or service meets an ongoing and documented community need.
 - It is a service that is not already being offered by other agencies in the community.
 - The program is of interest to and inclusive of all parts of the community, not just “members”. The program will actively seek to engage a broad cross-section of the community.
 - If a program has been previously funded, to what extent has the agency been able to deliver the program with that amount of funding? What are the positive results from the previous year of funding?

APPENDIX 2

Obligations of Program Funded Agencies

In order to complete the applications process, agencies applying for program funding must agree in writing to the following:

Federation acknowledges that other regulations and guidelines may be imposed on different organizations from outside the Jewish community and that these rules may supersede some of the commitments outlined here.

Federation Recognition

- Participate actively in promoting the success of Federation's fundraising and other activities. Encourage and enlist the participation of its constituency and members in activities such as the Annual Campaign Telethon, Campaign kick-off, Mitzvah Day and other Federation events.
- Include an appeal to support the Federation Annual Campaign in the organization's communication material at least once a year. Where appropriate, mention the relationship to Federation and/or place the Federation logo on communications materials (including letterhead, web sites, mail solicitation, brochures, newsletters, flyers, folders, etc.) Include mention of Federation's financial support in public communications regarding service delivery, where appropriate.

Accountability

- Provide program evaluations, survey results of clients/participants, audited financial statements, other financial and statistical reports as requested. Provision of grants for each program is conditional on the completion of Federation program evaluation reports.
- Advise Federation immediately of any major organizational changes (governance, service, program or funding changes), which affect services supported by the Federation allocation or the financial viability of the organization.
- Cooperate with Federation and other local Jewish organizations on addressing broad community issues and challenges that go beyond the scope of any one agency.

Community Building

- Use the Community Calendar that is on Federation's website as a tool for scheduling community events and agree to respect other organizations by making an effort not to hold competing events at the same time. Once submitted at www.jewishottawa.com, Federation will promote the event through our website, e-newsletter, social media channels, and Ottawa Jewish Bulletin.
- Ask that the organization's senior professional participate in the Executive Director's Forum or other initiatives which encourage greater cooperation and coordination among and between organizations that are a part of the Jewish community.
- Acknowledge that payment of funds granted to the organization may be subject to reduction or cancellation, in whole or in part, if the organization fails to carry out its activities, in whole or in part, as represented at the time of the request for funds. Decisions to alter funding will be made in consultation with the organization and will be considered as a last resort.