

**JEWISH FEDERATION OF OTTAWA**  
**RECOMMENDATIONS FOR PROGRAM & ORGANIZATIONAL**  
**FUNDING TO LOCAL AGENCIES**  
**FOR 2020/21 & 2021/22**

**1. Overview**

This report recommends allocations from the Annual Campaign to community organizations for 2020/21 and 2021/22. Federation has traditionally funded partner agencies through its Program and Organizational funding to carry out a variety of activities that enable our community to be inclusive, accessible, educated, and engaged. Note that this report does not include recommendations for School Funding or for Strategic Funding, which Federation funds through separate processes.

The following table provides an overview of Program and Organizational Funding.

	Description	Agreement Type	Application Cycle	Funding Period	Governance and Oversight
Organizational Funding	Largest-funded: <ul style="list-style-type: none"> <li>• OJCS</li> <li>• SJCC Hillel Lodge</li> <li>• JFS</li> <li>• Tamir</li> <li>• TDSO (proposed addition)</li> </ul>	Tailored Accountability Agreement (Yr 1)  Good Governance Checklist (every year)	N/A	Two-year	Annual Compliance Status Report  Annual: - audited financials - meeting
Program Funding	See Table below for complete list of programs funded	Letter with conditions (Yr 1)	Every two years	Two-year	Annual: - audited financials - Impact Report - meeting

**2. Process and updates**

The Grants and Evaluation Committee reviewed applications and annual impact reports from currently-funded programs and organizations.

- No new applications were accepted. Strategic funding is available for new initiatives.
- The Grants Committee recommends no changes to currently funded agencies for 2020/21 and 2021/22. This is due to the fact that the amount of dollars available to allocate remains unchanged.

### **3. Program Funding**

Program Funding is awarded to address specific programs and not underwrite agencies on the basis of their operating budgets. A total of 10 agencies re-applied for program funding for 16 programs. The Grants and Evaluation Committee reviewed the applications. The committee represents a broad cross-section of people in the community, and many have previous experience volunteering or working within local Jewish organizations.

The Chair of the Grants and Evaluation Committee and Federation Board Representative is Kevin Barwin. The members of the committee are: David Baker, Joel Diener, Aryeh Stegenga, Donna Klaiman, Helen Braiter, Hilary Cratzburg, Tal Scher, Jodi Kathron, Gerry Rip, Jeff Laks, Jonathan Greenberg, Adam Dodek, Elishua Ben-Choreen, and Harold Feder.

#### **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 September 2019. Agencies were informed that there were no planned increases to the funding envelopes. The application forms included impact report elements for the previous year and were completed on-line. Applicants were asked to acknowledge if the program has changed in scope or impact from the previous application period.
- Applications were reviewed thoroughly by staff and committee members in November.
- Face-to-face meetings were last completed in winter 2019, so no meetings were held at this time.
- The funding recommendations will be submitted to the Board for initial approval in January, 2020. Agencies will then be notified of the amount of funding that they will receive in 2020/21, with the condition that the amount is based on the Board approving the budget in May, and that this funding will only be confirmed after the Board's approval. Once Federation's budget for 2020/21 is approved by the Board, agencies will be notified of their exact funding.

#### **Measuring the Impact of Funded Organizations and 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 funding model, some agencies receive Program Funding, while the six largest agencies receive Organizational Funding.

Notes:

- Program and Organizational funding come from the envelopes listed below.
- Funding for OJCS and TDSO comes from the School Funding Envelope, although this is called “Organizational” funding based on the type of funding agreement.

**Funding Envelopes**

<b>Funding Envelopes</b>	<b><u>Current 2019-2020</u></b>	<b><u>Proposed 2020/21</u></b>	<b><u>Proposed 2021/22</u></b>
<b>Strengthening Community</b>	\$ 476,050	\$ 476,050	\$ 476,050
<b>Assisting the Vulnerable</b>	\$ 787,278	\$787,278	\$787,278
<b>Day School Funding (OJCS, TDSO*) *TDSO portion includes \$70K</b>	\$776, 566	\$776, 566	\$776, 566
<b>Total:</b>	<b>\$2,039,894</b>	<b>\$2,039,894</b>	<b>\$2,039,894</b>

**Proposed Program Funding**

<b>Program Funding: Strengthening Community Funding Recommendations</b>				
<b>Applicant</b>	<b>Program</b>	<b>Current Funding 2018/19</b>	<b>Requested Funding</b>	<b>Recommendation 2020/21 &amp; 2021/22</b>
AJA	AJA 50+	\$10,000	\$10,000	\$10,000
CSN	Shabbat & Holiday Programming	\$3,500	\$30,000	\$3,500
Hillel Ottawa	Student Campus Life	\$51,000	\$51,000	\$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	\$2,000	\$2,000
NCSY	Culture Clubs	\$24,200	\$24,200	\$24,200
Or Haneshama	Machaneh Shabbat	\$1,000	\$1,000	\$1,000
OTC	JLI Courses	\$3,000	\$3,000	\$3,000
OTC	Living Legacy	\$10,000	\$10,000	\$10,000
Sephardi Association	Sephardi Programming	\$9,000	\$10,000	\$9,000
	<b>TOTAL:</b>	<b>\$143,700</b>	<b>\$241,200</b>	<b>\$143,700</b>
<b>Program Funding: Assisting the Vulnerable Funding Recommendations</b>				
<b>Applicant</b>	<b>Program</b>	<b>Current Funding 2019/20</b>	<b>Requested Funding 2020/21</b>	<b>Recommendation 2020/21 &amp; 2021/22</b>
AJA 50+	Creative Connections	\$ 3,000	\$ 3,000	\$ 3,000
Camp B'nai Brith	Camper Scholarships	\$ 22,000	\$ 132,000	\$ 22,000
Jewish Youth Library	Friendship Circle	\$ 4,400	\$ 15,000	\$ 4,400
	<b>TOTAL:</b>	<b>\$ 29,400</b>	<b>\$ 137,400</b>	<b>\$ 29,400</b>

#### 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, each agency has a “**Tailored Accountability Agreement**” which lays out the commitments and conditions of funding and includes a Good Governance Checklist.

**This year, it is recommended that Torah Day School Ottawa start to receive Organizational Funding as they have reached the size, in terms of their budget and impact in the community, of the other large beneficiary organizations.**

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, these organizations 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 meet 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.

<b>Organizational Funding: Recommendations</b>			
<b><u>Agency</u></b>	<b>Current Funding 2019/20</b>	<b>Recommendation 2020/21 &amp; 2021/22</b>	<b>Funding Envelope</b>
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
TDSO	\$222,040*	\$222,040	School Funding

**\*Funding to TDSO includes the \$70,000 in operational funding that was approved by the Board.**

## 5. Summary of All Funding Recommendations

### Program Funding

By Agency	Current Funding 2019/20	Recommendation 2020/21 & 2021/22	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
Hillel Ottawa	\$51,000	\$51,000		\$51,000
JET	\$27,000	\$27,000		\$27,000
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 Haneshama	\$1,000	\$1,000		\$1,000
Ottawa Torah Centre	\$13,000	\$13,000		\$13,000
Sephardi Association	\$9,000	\$9,000		\$9,000
<b>Totals:</b>	<b>\$173,100</b>	<b>\$173,100</b>	<b>\$ 29,400</b>	<b>\$ 143,700</b>

### Organizational Funding

By Agency	Current Funding 2019/20	Recommendation 2020/21 & 2021/22	Funding Envelopes		
			Assisting The Vulnerable	Strengthening Community	School Funding
Hillel Lodge	\$231,787	\$231,787	\$231,787		
Jewish Family Services	\$384,487	\$384,487	\$384,487		
SJCC	\$384,667	\$384,667	\$54,817	\$329,850	
Tamir	\$86,787	\$86,787	\$86,787		
OJCS	\$554,526	\$554,526			\$554,526
TDSO	\$222,040	\$222,040			\$222,040
<b>Totals:</b>	<b>\$1,864,294</b>	<b>\$1,864,294</b>	<b>\$787,278</b>	<b>\$329,850</b>	<b>\$776, 566</b>

## 6. Next Steps

Once funding recommendations are approved by Federation's Board, 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, 2020.

## 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](http://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.