



MEMORANDUM OF UNDERSTANDING

Memorandum of Understanding between the **Jewish Federation of Greater Dallas**

And the **AGENCY 2023-2024**

The Jewish Federation of Greater Dallas and its beneficiary agencies share the mutual objective of the growth, vitality and safety of our Jewish community. While each agency has control of and bears ultimate responsibility for its operations and the manner of delivery of services, our collaborative local service network is intended to ensure that people and resources are brought together to build a vibrant and purposeful Jewish community that cares for those in need, deepens engagement in Jewish life, and creates connections among Jews locally, nationally and around the world.

To succeed, the Federation and its beneficiary agencies must engage in an open dialogue, a willingness to take risks, the demonstration of trust and value for one another's mission and respect for differences of opinion. One of Federation's primary roles is to coordinate the assessment of community needs and the strategic allocation of resources to address those needs locally, as well as in Israel and Jewish communities around the world.

The Federation and the agencies are stewards of the community funds and must demonstrate to donors that dollars invested in our network of agencies are used in a thoughtful, responsible manner to achieve the greatest impact. The success of our Jewish communal enterprise rests with the mutual commitments and expectations outlined in this document.

Therefore, the leadership of the Federation and AGENCY, pledge to fulfil the following mutual commitments:

I. Federation's Responsibilities to the AGENCY:

- Lead community-wide fundraising campaigns on behalf of the Jewish community in the Greater Dallas area.
- Strategically invest funds in priority issues, in collaboration with AGENCY and other key stakeholders.
- Provide professional security assistance, assessments, grant advising to the agencies participating in the Federations Community Security Initiative (CSI).
- Promote AGENCY and its services to the community through Federation's communications and marketing initiatives. Use agency-provided photos and copy and thus highlight the AGENCY's achievements in the Federation's print and electronic marketing materials. Feature the work of AGENCY at community events and Federation Board meetings.

- Foster inter-agency partnerships on issues of common interest.
- Make best efforts to keep administrative burden to a minimum, including minimizing and streamlining requests for information, being flexible as to the format of requested information, and avoiding duplicative requests.
- Provide crisis intervention and other assistance, upon request.

II. The AGENCY's Responsibilities to the Federation:

- Utilize Federation funding according to the funding request, and adhere to the grant guidelines outlined in this Memorandum of Understanding, and applicable grant-specific terms. Any proposed changes to the utilization of funds, must be communicated before funds are spent, and only with the written approval of the Federation.
- Actively solicit Board members and senior level professionals for the annual Federation/UJA Campaign. Appoint a liaison from your board to work in consultation with Federation to conduct an annual campaign that achieves 100% participation with meaningful board and professional gifts to Federation.
- Provide updated donor/constituent mailing information and email addresses to the Federation electronically by December 31, 2023. Please use the attached Excel template.
- Help reinforce the Jewish community's understanding of how gifts to the Federation are used to support your agency and the Dallas Jewish community, by implementing the following policies:
 - The Federation should be recognized at the appropriate sponsor level consistent with the annual agency allocation, including but not limited to events, digital and printed signage, and other marketing materials.
 - Notify recipients of the Federation-funded grants when appropriate (e.g. tuition assistance, grants, scholarships, etc.)
 - Follow detailed branding guidelines applicable to the electronic and printed materials for all funded agencies. Please see and sign the attached Marketing Addendum
- The Federation and/or its representatives should be acknowledged at major agency events and community gatherings. Where appropriate, a Federation representative should be invited to bring short greetings to the audience. If a printed program is created for an event, the Federation should be provided with a page in the publication.
- Participate in the Community Security Initiative (CSI). *Signing the "Community Security Initiative Partnership Agreement" confirms your agency's participation in CSI.*
- Submit any relevant reimbursement requests (per Reimbursement Guidelines) as well as all Federation requested financial reports in a timely manner. Advise Federation of financial concerns immediately upon discovery.

- Support Federation's responsibility to be accountable to community donors by providing full, accurate and timely information, including program statistics and program evaluation to Federation.
- Collaborate with Federation to identify the best volunteer leadership possible for the community.
- Coordinate the launch and strategy of capital campaigns, and or endowments with Federation in advance of public announcements.
- Comply with all applicable laws and regulations.

III. Shared Federation/AGENCY Commitments:

- Partner on strategies, programs, and initiatives aimed at strengthening the community.
- Work diligently to avoid conflict with other planned events and programs by consulting and actively contributing to the community calendar, which will be maintained by Federation.
- Facilitate opportunities to feature the work of the agency through joint programming, mini-missions or other community engagement efforts.
- To minimize duplication of programs and efforts, consult with Federation's planning department and other agencies prior to initiating or developing a new program that is within the core mission or strength of another agency.

AGENCY

Chair of the Board

CEO/Executive Director/Rabbi

Jewish Federation of Greater Dallas



Chair of the Board



President and CEO