



## 2025 AGENCY ALLOCATION APPLICATION

Agency Name: \_\_\_\_\_

Contact Person/Title: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_ Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

Total Operating Budget: \_\_\_\_\_ Tax Exempt Organization 501c(3):Y/N? \_\_\_\_\_

Website address: \_\_\_\_\_

Amount Requested: \_\_\_\_\_

**Instructions:** To be considered for funding by the Greensboro Jewish Federation for this year, all agencies must return one copy of each, via email to Melissa Oliver, Director of Finance and Administration: [moliver@shalomgreensboro.org](mailto:moliver@shalomgreensboro.org) and copy Glenda Bernhardt, CEO: [gbernhardt@shalomgreensboro.org](mailto:gbernhardt@shalomgreensboro.org) by **Friday, August 1, 2025**

### REQUIRED:

- Completed questionnaire, please limit to **4 pages**
- List of current Board of Directors
- Statement of Financial Position (Balance Sheet) and Statement of Activities (P&L) for trailing twelve months if possible, or for the most recent fiscal year end
- Most recent budget
- IRS letter indicating tax exempt status
- Last year-end audit for agencies requesting \$10,000 or more
- Detailed statement of its history, purposes and activities

### OPTIONAL:

- **Organizations requesting \$25,000 or more will have an opportunity to make a presentation** to the committee for no more than 20 minutes followed by a Q & A session. We would prefer these presentations to be in person on Sunday, August 24<sup>th</sup>, if possible. If not, here are the other options for presentations:
  - **Monday, August 18 between 7:30 p.m. and 8:30 p.m.** (Virtually via Zoom only)
  - **Wednesday, August 20 between 6:30 p.m. and 8:30 p.m.** (In person or virtually via Zoom)
  - **Sunday, August 24 between 8:45 a.m. and 11 a.m.** (In person or virtually via Zoom)

Please contact Melissa Oliver to schedule.
- Each applicant may prepare a short video (up to 5 minutes) that highlights their organization's mission and what impact the funding will make. We strongly **encourage all applicants requesting between \$5,000 and \$25,000 to prepare a video.** These videos will be shared with the allocations committee. Deadline for the video is August 14<sup>th</sup>.

**PLEASE NOTE:**

- Requests for equipment or other capital expenditures will not be considered
- Funding for programs serving children younger than kindergarten or for day camps or day care services will not be considered

**QUESTIONNAIRE**

**1. Agency mission statement?** If you do not have one, please describe the purpose of your agency in one paragraph.

**2. Give a brief summary of your agency’s notable successes. In what ways have these successes been impactful or important?**

**3. If you received an allocation last year, how was it spent?**

**4. Specifically how will your agency be using the funds from the Federation? If possible, please identify the approximate number of members of the Jewish community in North Carolina served by your organization. If you have made a request in the past, what is the difference between this current request and your earlier requests(s)?**

**5. Please state anticipated program changes** (enhancements of existing programs, addition of new ones, elimination of program components) **for your agency/institution over the next 3 to 5 years, and why.**

**6. Briefly describe how you evaluate whether your agency is meeting its objectives** (e.g. surveys, community feedback, service statistics, other methods).

**7. Do you work collaboratively with other agencies (please identify them), and on which programs or projects?**

**8. If other agencies/organizations provide similar services/programs within your target demographic, how are you unique? How do you work together?** (please be specific)

**9. Please briefly describe the agency’s Board or other governing bodies, addressing:**

- a. How frequently does it meet and what are its primary functions?
- b. Is there an Executive Committee? How frequently does it meet and what are its primary functions?
- c. Are 100% of the Board members donors to your organization?
- d. Do Board members participate in fundraising for the organization?

**10. Does your agency conduct supplementary fundraising in the Greensboro area? If so, describe your fundraising activities. How much was raised in Greensboro during the last fiscal year and from how many individuals? Do you anticipate any new fundraising this coming year? (Please specify.)**

**11. Other Funding Sources:**

<u>Funding Source</u>	<u>Total Request</u>	<u>Amount Committed</u>
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**12. What percent of your revenue is from Federations?**

**13. Do 100% of your board members contribute to your local Jewish Federation?**

**14. What percent of your annual revenue is received from endowment revenue? What is the amount of your unrestricted endowment funds?**

**15. Do you have operating reserves? If so, what is the dollar value as of your last fiscal year end? How many months of operations does this amount represent?**

**16. In regard to your current financial statement, please explain budget variances of greater than 25%.**

**17. [for national/regional agencies only] Are there members of the Greensboro Jewish Community who sit on your board? If so, please list:**

**To receive financial support, each local beneficiary shall agree to:**

- a. Maintain responsible management with a Board of Directors or administrative committee.**
- b. Cooperate with other agencies in preventing duplication of effort and in promoting efficiency and economy administration.**
- c. Keep the Federation informed of any new activities undertaken with Federation funding, or of the curtailment or discontinuance of activities previously undertaken, giving the reason for such action and the changes ensuing therefrom in the financial condition of the organization.**
- d. Accept the appointment of funds as recommended by the Allocations Committee and approved by the Board of Trustees.**
- e. Maintain all books and records for inspection for at least 2 years.**
- f. Notify the Federation upon the occurrence of any misappropriation of funds.**

**Agreement to adhere to these provisions shall be binding from year to year unless written notice has been given by either the beneficiary organization or the Federation at least two (2) months before the close of the current budget year.**

Signature of chief staff person and chief officer of the agency or parent agency indicating approval of request submitted and consent to all written Federation Allocation Guidelines attached.

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Print name/title

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Print name/title

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Signature

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Signature

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Date

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Date