



2021 AGENCY ALLOCATION QUESTIONNAIRE

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 Michele Perrell, Director of Finance and HR: mperrell@shalomgreensboro.org and copy Marilyn Chandler, Executive Director: mchandler@shalomgreensboro.org by **Monday, August 2, 2021**

REQUIRED:

- Completed questionnaire, please limit to **4 pages**
- List of current Board of Directors
- Actual 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 in person (or virtually via Zoom) for no more than 20 minutes followed by a Q & A session on one of the following dates: August 22 between 10 a.m. and 12 p.m. OR August 25 between 6:30 p.m. and 8:30 p.m. Please contact Michele Perrell 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 2.

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. [for local agencies only] Do 100% of your board members contribute to your local Jewish Federation?

14. What percent of your annual revenue is received from endowment revenue?

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

16. *[for national agencies only]* Do you consider the allocation made by the Greensboro Jewish Federation to your organization to be annual dues?

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

18. Was the effect of the pandemic considered in your application? How has the pandemic changed your plans and the way requested funds would be used?

19. Do you have any carryover of unexpended funds due to changes in operations due to the pandemic (i.e. cancelled programming, travel, etc.), and if so how are they being used?

20. Has your organization received a SBA Payroll Protection Program Loan/Grant (PPP, PPP2 or ERTC)? And if so, how has that funding affected your current and next year's budget?

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

print name/title

print name/title

signature

signature