

Greensboro Jewish Federation

Allocations and Budget Committee Guidelines

Excerpts - Federation By-laws, Article VII - Committees

The purpose of the Budget and Allocations Committee: *The Budget and Allocations Committee shall study and evaluate the merits of Federation expenditures and disbursements and shall recommend to the Executive Committee and Board of Trustees amounts to be allocated for Federation expenses (including administrative costs, programs and services) as well as allocations for local, national and overseas agencies. The Budget and Allocations Committee shall consist of no less than twenty (20) members.*

1. Who can serve on the Budget and Allocations Committee?

Any Federation member in good standing (*Any person of the Jewish faith who is eighteen (18) years of age or older, as well as any member of such person's immediate family and/or household who is eighteen (18) years of age or older, shall be eligible to become a member of the Federation. Membership shall be effective upon the payment of a contribution to the Federation and shall be effective for that fiscal year in which such contribution was made and the fiscal year immediately following.* - Excerpts, Federation By-laws, Article IV- Membership, Sec. 1-Eligibility)

A knowledgeable, interested, committed and experienced individual in our Jewish community, who may be involved in a leadership development program and who represents broad community interest shall serve on the Allocations and Budget Committee.

The Federation President and Executive Director sit as ex-officio members of the Allocations and Budget Committee.

2. Who chairs the Allocations Committee?

The Federation Treasurer. The Federation President-Elect may chair the GAPS Committee to review General/Administrative and Programs & Services of the Federation.

3. Who can apply for funds?

Any potential beneficiary that falls within the purview of the Federation's bylaws/purposes. This is ultimately determined through pre-screening conducted by the Federation Executive Director, Allocations Committee Chairperson and Federation President.

Excerpts from the Federation By-Laws Article II - Purposes:

The Federation is a non-profit corporation formed to promote the welfare of the Jewish people at local, national and international levels. The Federation strives to build community among the Jewish people of Greensboro and to assure continuity from generation to generation. The Federation works to accomplish its goals by providing Jewish educational and cultural activities, promoting an understanding of Jewish culture and concerns, fostering cooperation and effectiveness among Jewish organizations, developing human and financial resources to meet Jewish needs, and by building strong relationships with the community-at-large.

The Federation carries out its purposes both by direct expenditures of funds raised for such purposes and by contributions to other organizations, agencies and institutions to whom contributions qualify as tax-deductible under the Internal Revenue Code.

4. All agencies seeking funds must complete an application sent by the Allocations and Budget Committee.

Any organization desiring to receive financial support from the Federation must submit on request:

- a. A statement by its President certifying that its governing board has voted to apply for admission as a beneficiary.*

- b. *If the beneficiary is a sub-group of a larger institution, an executive officer of the larger institution must approve the application by signing the application.*
- c. *A detailed statement of its history, purposes and activities*
- d. *A current audited statement of its assets and liabilities and its last annual audited statement of its receipts and expenditures, all in such form and detail as may be required but in no event more than eighteen (18) months old.*
- e. *Any other information regarding finances, administration, services, and community relationships that may be required by the Board of Trustees, as well as a certified copy of the certificate issued by the IRS attesting to the tax deductible status of contributions to the organization under the applicable provisions of the Internal Revenue Code and regulations promulgated thereunder.*
- f. *A list of the officers and directors of the beneficiary.*

5. Are there any restrictions for local beneficiaries regarding fundraising?

Federation policy requires that agencies requesting and receiving funding from the Federation honor the Federation campaign black-out period from January through March. Therefore, agencies are asked to refrain from any fundraising during this time period.

6. Are there any restrictions on what the grant can be used for?

Federation policy has stated these as priorities and restrictions in funding grants:

- a) Impact for Jewish community
- b) Mission statement compatibility
- c) Programs and services, not capital expenditures
- d) Programs for ages Kindergarten and up
- e) No funding for subsidies or scholarships for pre-school, daycare or day camp (endowment funds or private funding separate from campaign allocation is allowed)

7. Who can present on behalf of the requesting beneficiary?

Presentation on behalf of the local agencies will be conducted by the beneficiary's President and Treasurer (preferred), or their representatives.

No member of the Allocations and Budget Committee can make a presentation on behalf of the beneficiary. In other words, the spokesperson making the presentation on behalf of the potential beneficiary can not sit on the Allocations and Budget Committee.

8. There is no limitation on the number of times a potential beneficiary can apply for funding.

9. Accountability

The Federation has responsibility to follow the dollars given for a specific purpose. Funds need to be used for the purpose for which it was given. It is up to the Federation professional staff to follow-up and to notify Federation leadership regarding possible misappropriation of the funds.

For the purpose of receiving financial support, each local beneficiary shall agree (in writing) to:

- a. *Maintain a 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 by it, 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.*

Agreement to adhere to the foregoing provisions of this Article shall be submitted in writing by the beneficiary agency and 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.