

Greensboro Jewish Federation

Allocations Committee and Applicant Guidelines

The GJF Allocations Committee studies and evaluates the merits of Federation expenditures and disbursements and recommends to the GJF Executive Committee and GJF Board of Trustees amounts to be allocated for Federation allocations for local, national and overseas agencies. The Allocations Committee will consist of no less than twenty (20) members.

1. Who can serve on the 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 or who represents broad community interest shall serve on the Allocations Committee.
- The Federation President and CEO sit as ex-officio members of the Allocations Committee.

2. Who chairs the Allocations Committee?

The Federation Treasurer chairs the Allocations Committee with the assistance of the Federation Director of Finance and Human Resources, who will be the liaison between potential beneficiaries, the committee and 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 CEO, Allocations Committee Chairperson (Federation Treasurer) and Federation President.

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

The Federation is a non-profit corporation formed to build community among the Jewish people of Greensboro, assuring continuity from generation to generation. Recognizing that each Jew is responsible, one for another, The Federation promotes the welfare of the Jewish people in our community, in Israel and worldwide. The Federation carries out its purpose both 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, and contributing 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 made available by the Allocations Committee.

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

- a. 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.
- b. A detailed statement of its history, purposes, and activities
- c. 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.
- d. Any other information regarding finances, administration, services, and community relationships that may be required by the Allocations Committee or Board of Trustees, as well as a certified copy of the determination letter 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.

- e. A list of the officers and directors of the beneficiary.

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

Federation policy suggests 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.

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, Treasurer, Senior Agency Professional (preferred), or their representatives.

No member of the Allocations 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 Committee. At times, committee members may be asked to research an agency and report to the committee unbiased information.

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.

To receive financial support, each local beneficiary shall agree (in writing) to:

- a. Maintain responsible management with a Board of Directors or other executive 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 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.