



Jewish Federation
OF WINNIPEG



REPORT OF THE ALLOCATIONS COMMITTEE

For the period: September 1, 2020 - August 31, 2021



MARCELO APROSOFF, CHAIR
June 2020

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Report of the Allocations Committee to the Board of Directors for its meeting of June 16, 2020

Allocations Committee Mandate

Each year the Jewish Federation of Winnipeg's Combined Jewish Appeal campaign, conducts an annual campaign to raise the funds necessary for the operation of the Federation and its Beneficiary Agencies. The Allocations Committee is empowered to solicit requests for funds required for operating from those organizations previously accepted as Beneficiary Agencies. The Committee reviews those requests and recommends allocations to be provided to the agencies for the following fiscal year, i.e. in the fall of 2019 funds were raised for allocation to agencies for the year Sept 1, 2020 to August 31, 2021.

The Committee provides oversight to fulfill the Federation's fiduciary responsibilities, ensuring the donors' valuable investments are well used. The process is also an opportunity to celebrate their successes and of course, offer to support their challenges through funding as well as offers of expertise, networking with others, etc.

Allocations During a Pandemic

As lockdowns began in March 2020, the allocations process was suspended in recognition that everyone was, and particularly agency leadership were, occupied in the extreme with adaptation and survival strategies. A simplified process was run in May 2020 with two meetings of the Committee on Zoom reviewing submissions of financials, projections in two scenarios if possible, and answers to a few key questions.

The Committee was tasked with allocating all the dollars available, to fund the full fiscal year. Alternatives were discussed considering the uncertainty of the coming year and were discarded in favour of providing the agencies with secure income for the full year ahead.

Dollars Available for Allocation

The community was fortunate that the CJA Campaign was almost complete when the pandemic affected operations. The Board of Directors was pleased to report that the goal of \$6 million dollars was reached and approved an amount for allocation to local beneficiaries of **\$2,840,000**.

It is equally fortunate that the agencies went into this difficult time with strong financial bases.

Looking Forward

The Committee deferred some of the broader matters they had hoped to discuss with agencies in person during their presentations. They will plan to stay together and meet with agencies in the fall to see how they are doing and take a deeper dive into how they will cope with the next year. The Federation will work with agencies to maximize efficiencies. These meetings will include working collaboratively and creatively with agency leadership on:

- Areas for consolidation and collaboration across organizations to save them money and time.
- Delivering high quality service with the potential need to reduce expenses and provide more subsidies.
- Re-shaping programs around smaller group gatherings and technology required to provide hybrid in-person plus virtual environments for programs as needed.

The Committee encourages agency leadership to take an active role in the upcoming CJA Campaign in the fall of 2020, as the needs are deep and the constituencies of the agencies are broad based. A renewed focus on the Campaign will help each agency receive the allocation they need to operate in 2021-22 and beyond.

Collaborative Tables

It is a point of pride to report that the agencies participate in cross communal planning efforts and projects that result in creative collaborations that serve the community and support each other. Some examples of joint planning and collaborative initiatives, which promote coordination and consolidation are:

Beneficiary CEO/ED meetings: Federation regularly convenes meetings of Beneficiary top staff leadership who exchange information and find ways to work collaboratively as they meet.

Sub-committee on Aging: Initiated by the Sub-committee on Aging, the Senior Concierge project was grant funded and in the process of hiring an outreach worker at the time of the shutdowns. The project proceeded with recognition by the professionals involved that outreach to seniors was even more critical now than ever, though the activities would be adapted to current realities. JCFS, GSCLC, RJCC and Federation are working together to direct and support the work of a newly hired Senior Concierge. Federation acquired the grants. JCFS employs and supervises. Synagogues are also being consulted and included in the work plan.

Planning for summer camp: Federation planning and engagement staff are meeting with the JCC and resident Camp staff to consider cooperative and joint activities in summer that will help engage more children and teens and keep them connected in the face of overnight camp closures.

Recommended Allocations

Each agency did their best to project their full year budget. But the level of uncertainty was very high at the time of submission. Re-opening and closure announcements were and are coming weekly with short notice and little information about how re-opening is to be managed. Everyone is figuring things out for the first time as we all navigate uncharted territory and are admirably managing the uncertainty with calm and constant listening to community members' needs.

The Environment in 2020:

1. Service in the face of social distancing and limited numbers for gathering in person entails higher staffing levels for fewer clients/customers/members.
2. Every agency is maximizing access to Federal, Provincial, and foundation grants for COVID relief, and the leadership share information freely and productively.
3. As the Allocations process began, Federation simultaneously launched a COVID-19 Community Relief Fund. At the time of allocations meetings, some agencies had already applied to the relief campaign and some were considering. The relief fund has set a goal of \$750,000 to accommodate the applications received.
4. The Federation and Jewish Foundation of Manitoba will continue to communicate and work together, sharing information about COVID relief applications, to ensure that the needs are filled without duplication of grants.

Analyzing requests for annual needs:

Each organization has some reserves, resources, and other sources of funds for emergent needs, including the Federation's COVID Community Relief Fund grant requests. None of the beneficiaries appear to be at risk of imminent failure due to these various sources of funds. In fact, there is a high level of financial health generally, going into this Allocation period.

As noted, annual allocations are intended to fund ongoing operating needs that provide key service to the Jewish community, to keep the operations going. A key question in this environment was "What is business as usual?" and "What is COVID related expense?".

The committee was presented with the requests based on two scenarios. The requests were analyzed to separate ongoing operating from COVID related needs for the coming year and to focus on essential service. Having examined which elements could be considered emergent, the amount used as the "request" was based on what could be delineated as annual operating from clearly unusual amounts due to COVID-19.

The following notes are intended to describe some of the impact of the pandemic on the agencies at the time of the Allocations meetings, to answer the question “What are they dealing with?”.

Aleph Bet Child Life Enrichment

- Closed since March, the centre did not open as a site for essential workers due to risks and complications
- They are required to open in June or lose operating grants and are planning for fewer children per staff, more supplies, more staff for cleaning, and generally overall higher costs per child. They are not receiving any extra funds from MB for additional operating costs and their special needs funding is not forthcoming.
- Lower ratios, new activity materials so each child has their own for non-washable items, and increased cleaning will be needed for the coming year.

Camp Massad

- At the time of writing this report, Massad is still waiting to hear whether camp will be possible this summer.
- They have begun annual site maintenance required for opening and to ensure the integrity of the buildings for the future. They are planning for every variation from full opening to partial opening to one session to full closure.

BB Camp

- With Ontario just recently declaring that camps would not open this summer, they are now planning for minimal site maintenance and building development. The Camp is operating with two staff to ensure site integrity.
- Assuming the camps will open fully in 2021, BB Camp is planning for increased use of the longer sessions for older campers to accommodate the campers who would otherwise have lost out on their last year at camp due to closure this summer.

Gray Academy

- The school immediately adapted to online learning and their virtual delivery has been well received. They are again quickly shifting gears to re-open in June with limited students in school and re-planning for the cost and complications of opening safely. The requirement to be partly present and partly virtual with the mandate that teachers teach from the classroom will require technology acquisition and upgrades.
- They anticipate increased subsidy requests in the coming year.

Gwen Secter Creative Living Centre

- Gwen Secter Creative Living Centre had been building up an innovative set of programs for seniors of all ages prior to closure due to COVID-19. They pivoted quickly to meet the much deeper need of providing healthy, cooked meals twice per week to seniors who had never come forward for support previously. They increased from a few meals the first week to 200 per week in just a few weeks, and demand continues to rise.
- They are experiencing an entirely emergency focused operation, staying in touch with seniors by phone and serving increased numbers with contact and meals.

Irma Penn School of Jewish Learning

- After adding the extra Wednesday class for B'nai Mitzvah students as planned this year the school pivoted their classes online and are continuing to plan to offer school online in the fall.
- They are anticipating more subsidy requests for next year and have asked for an increase from Federation.

Jewish Child and Family Service

- With significant financial resources available for various specific purposes, JCFS is stable and actively pivoting to distance service, increased service to seniors, new modes of service delivery for individuals and groups, and supporting everyone else. The growth in the intake of seniors' cases has been dramatic.
- The new emergent needs that are part of the new budget may indeed be the new normal for the next several years. They anticipate increasing financial assistance required and staffing to vet financial assistance requests, to support seniors, and to support mental health needs. While these are needs created by the emergency, they are likely not short term.

Jewish Heritage Centre of Western Canada

- The JHCWC pivoted quickly to trim their operation and begin to plan virtual programs for next year. Fortunately, the Kanee fundraiser was mostly complete and they are retaining a high level of that support as they postpone the event.
- They plan to continue their accessioning and archival work as soon as they can go back into the building with a grant funded summer student to help the archivist.

Jewish Learning Institute

- JLI is attempting to pivot their adult classes to online and plan for both possibilities, expecting that virtual programming will result in less revenue.
- They are shifting as needed.

Rady Jewish Community Centre

- The first year for their new CEO is beyond challenging. They are living with uncertainty that impacts everything they do. They were closed as the allocations process began, with some online videos and resources for members, with the exception of daycare designated as essential and operating under severe constraints.
- They laid off 85% of their staff. Of the remaining 15%, 70% of that is daycare staff for the 50 spaces deemed essential.
- They are now opening day camp and the fitness centre in June under new rules and constraints.
- They just don't know what their new normal will be and are gradually planning to re-open as they can. Some of their best revenue generating programs like aquatics lessons may not be possible.

Shalom Residence

- Shalom Residence has adapted to pandemic conditions with additional staffing and activities for residents. They are expecting MB support for the extra costs resulting from needing daytime staff since residents can no longer go out to work or day programs.
- They are dealing with two deaths (not from COVID), closing one house, and lack of intake and referrals for new residents from MB Family Services, in addition to shortages of gloves and technologies. And yet, if you ask, you'll find out "they're fine".
- Used to adaptation to so many needs, they appear to be in a constant state of adaptation. They do not know how long the day programs their residents normally use will be unavailable and are filling the gaps.

Saul and Claribel Simkin Centre

- The Simkin Centre locked down the residence early in the pandemic which included not allowing companions and contractors in, who provided a lot of personal supports and other services. They have been Covid-19 free, engaging in strict protocols, which change frequently with WRHA updates.
- They have started a new online newsletter, trained all staff to help with feeding, and are thrilled to get messages of support.
- They supplemented WRHA funding for PPE and are requesting funding from the Relief Fund to cover those costs.
- The Centre's new normal is increased cost of kosher food not covered by provincial per diems for food.

The Committee Recommends the following allocations:

Report of the 2020 Allocations Committee

Beneficiary Agency	2020/21 Recommended Allocation ---- needed to stay in operation	2020/21 Portion that is more appropriate for COVID Relief	2020/21 Request: Clearly Operating Funds	Requests:	2019/20 Actual Allocation
Aleph Bet Child Life Enrichment	7,000	50,000	7,000	57,000	7,180
B'nai Brith Jewish Community Camp	60,000	15,000	60,000	75,000	60,000
Camp Massad	60,000		60,000	60,000	60,000
Gray Academy of Jewish Education	984,000		984,000	984,000	964,000
Kaufman Silverberg Library	38,500		60,000	60,000	58,500
Total to Gray Academy	1,022,500	20,000	1,024,000	1,044,000	1,022,500
Gwen Secter Creative Living Centre	90,000		90,000	177,000	84,626
Kosher Meals on Wheels	40,000		40,000	40,000	36,005
Kashrut Mashgiach	10,500		10,500	10,500	9,129
Total to Gwen Secter Creative Living Centre	140,500		140,500	227,500	129,760
Irma Penn School of Jewish Learning	5,500		7,000	7,000	5,500
Jewish Child and Family Service	815,300	100,000	780,841	880,841	769,841
Chaplaincy	54,400		54,366	54,366	54,366
Total to Jewish Child and Family Service	869,700		935,207	935,207	824,207
Jewish Heritage Centre of Western Canada	77,000		81,000	81,000	77,000
Jewish Learning Institute	1,800		12,000	12,000	5,642
Rady Jewish Community Centre	540,000	500,000	510,000	1,010,000	510,000
Shalom Residences	36,000		38,000	38,000	35,902
Simkin Centre	20,000		89,000	89,000	12,309
Total requested/allocated to Local Agencies	2,840,000	685,000	2,963,707	3,635,707	2,750,000
Funds Available for Local Allocation	2,840,000		2,840,000	2,840,000	
Requests in Excess of Funds Available	0		123,707	795,707	

A Final Note from the Chair to the 2020 Allocations Committee

This year's Allocations Committee had to deal with a number of unusual situations and many unknowns due to the COVID-19 pandemic and the uncertainty that brought to our beneficiary agencies and the community at large.

The allocation process structure was also different since the Committee did not have the opportunity to meet with our beneficiary agencies due to social distance limitations. Zoom meetings bring a totally different dynamic and way of interaction. The Committee quickly adapted to a very tight timeline to review, discuss and approve the allocations for this year in a record time.

I want to highlight the many meaningful recommendations that committee members offered to encourage building stronger relationships between agencies and the Federation as well as to look for opportunities to optimize resources and ensure that community dollars are spent in core services and in alignment with community needs and priorities.

Thank you so much for volunteering to serve on the 2020 Allocations Committee. I am grateful to have a dedicated group of people who were able to bring their personal insights as well as their passion, knowledge, and collaborative efforts to the table during this crucial time.

I was so impressed by this year's allocations sessions and hope that you were able to learn as much as I did!

I want to express my sincere gratitude for your service, dedication, and your judicious stewardship of our community.

Thank you for your ideas, recommendations, deep conversations, and wise advice that will allow our agencies and community to move forward.

I look forward to your ongoing involvement with the Allocations Committee and the Jewish Federation of Winnipeg.

Sincerely,

A handwritten signature in black ink, appearing to read 'Marcelo Aprosoff', written in a cursive style.

Marcelo Aprosoff

Allocations Committee Chair

Allocations Committee 2020:

Marcelo Aprosoff, Chair

David Carr

Carol Duboff, Chair, Community Planning

Ellen Fleishman

Mabel Fridson

Joel Lazer, President, JFW

Paula Parks, Women's Philanthropy Co-Chair

Brent Schacter

Yael Silver

Marcela Sussi

Sindee Wilhelmer

Eric Winograd

Marc Zynoberg

Our Mission

Acting as the representative body of the Winnipeg Jewish Community, building and sustaining a strong, secure and connected community rooted in Jewish values.

Our Vision

Building a vibrant, connected Winnipeg Jewish Community.



Jewish Federation
OF WINNIPEG

OUR FUTURE.
POWERED BY YOU.

C300-123 Doncaster Street | Winnipeg, MB R3N 2B2
204.477.7400 | info@jewishwinnipeg.org
jewishwinnipeg.org