



Jewish Federation
OF WINNIPEG

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.



REPORT OF THE **ALLOCATIONS COMMITTEE**

For the period: September 1, 2022 - August 31, 2023

MARCELO APROSOFF, CHAIR

April 2022

Approved by the Board of Directors on May 25, 2022

Each year the Jewish Federation of Winnipeg's Combined Jewish Appeal conducts an annual campaign to raise the funds necessary to sustain the Federation, its Beneficiary Agencies, and global Jewish needs. The Allocations Committee is empowered to solicit requests for funding from Beneficiaries, to review them with the goal of fulfilling Federation's responsibilities in evaluating those requests and the organization's financial circumstances and recommending allocations that maximize the impact of allocations.

Maimonides, the Rambam, teaches that there are eight levels of Tzedakah. There is a community responsibility in Jewish law to give to the communal "*kuppah*", the source of funding for the poor. Maimonides cautions that

"One should not drop money in the *kuppah* unless one is sure the person in charge is trustworthy, wise, and competent to handle the funds properly."

The allocations process is one aspect of assuring that Federation handles the funds properly, able to instill confidence in our donors that their donations are being put to the best use possible to sustain Jewish community services in Winnipeg, ensuring needs are met and important institutions are sustained.

The Allocations Committee takes this responsibility seriously as it works to refine processes and use diverse kinds of information to assess need for funds and recommend allocations.

The purpose of annual funding

Federation Beneficiaries are agencies that apply for and receive annual funding that facilitate their ongoing service to the community. Unlike foundations, the allocations process does not provide grants to address one-time project funding.

Each agency was accepted by the Board of Directors as a Beneficiary because of the essential and unique needs they fill for the Jewish community. For some agencies the allocation is a small percentage of their overall budget, funding the Jewish nature of the service beyond what government funding supports.

None of the agencies depend on Federation as their primary funder. However, some rely on Federation as the only annual unrestricted funder that provides an essential core for their budget.

Allocations Committee Process

The Allocations Committee is building a more robust approach to assessing Beneficiary needs and impact of funding. The Committee has two main functions:

Annual Allocations: Solicit and review applications for annual funding from local beneficiaries, ensuring fiscal responsibility and viability. Recommend allocations to the Board of Directors based on needs, community priorities and availability of funds.

Agency Liaison: Meet with agencies to improve alignment with community priorities, efficiencies through cross-communal collaboration, and appropriate data collection to demonstrate community impact to donors.

The Committee expanded its activities last year to begin meeting with agencies throughout the year, in order to stay in touch with their challenges and successes year-round. The chair and members of the Committee met with Beneficiary representatives:

- Fall of 2021 to check in on the effects of the pandemic; and
- February 2022 to focus on the need to present outcomes and indicators of community impact.

These meetings and the resulting documentation were the beginning of an ongoing process to build a deeper understanding of the work of each agency and improved articulation of each agency's need for Federation funding. The Committee will work with agencies over the next few years to refine reporting of outcomes and indicators of impact. This data comes from diverse sources including:

- the agency's own data tracking;
- national surveys in the field; and
- community feedback mechanisms.

Various agencies are increasing their feedback processes through the community callouts they began doing at the beginning of the pandemic, online post program surveys, and with in-person meetings.

Federation works in an integrated fashion, articulating needs, raising funds to support those needs, and distributing the funding in a cohesive cycle. These improvements will provide better data to:

- make the case for donors and the community at large who will get a better understanding of the needs and the impact of their funding;
- identify needs and gaps for Community Planning; and
- identify opportunities for collaboration and other kinds of resources e.g. to access grants, foundations, bulk buying opportunities, and opportunities to advocate with government.

Each agency offered approval and thanks at the February meeting for this expansion of the process. They generally believe this approach will be valuable as it is more fully deployed, and data is collected over a period of time.

Developing Allocation Recommendations

The Timeline:

- March 21 – Proposals provided by agencies.
- March 23 - 25 – Committee received submissions and additional information
- March 29 - April 6 – The full Committee met with each agency to hear presentations.
- April 11 – JFW Board of Directors approved an amount available for allocation this year of \$3,003,000.¹
 - Fundraising trends towards more targeted giving preferences rather than “umbrella” campaigns continued to grow. Even so, the annual Combined Jewish Appeal campaign (CJA) remains strong. The Campaign closed with a total of \$6,201,200 from 2176 donors, an extraordinary achievement by the Campaign leadership and staff.
- April 12 – Committee met to develop allocation recommendations, using summarized agency profiles and notes, a briefing by the CJA Chair, and a briefing on Community Forward priorities. They were asked to consider the allocations based on current need and not on historical amounts.

¹ The amount available for allocation is influenced by several factors which are reviewed by the Finance Committee, who recommend the amount for board approval:

- Unrestricted giving total was less than last year due to:
 - a one time Human Services grant and donors match through Jewish Federations of North America to support needs during the pandemic; and
 - a one time bequest that the donor asked be used for allocations last year.

CJA Campaign total (as of April 11, 2022)	\$ 6,201,200
Designated for distribution to Federation local and Israel beneficiaries	\$ 1,324,631
Available for JFW fiscal year Sept 1, 2022 - Aug 31 2023	\$ 4,876,569
Recommended Allocations	\$ 3,003,000
JFW National commitments to CIJA, JDC, JAFI, UIAFC	\$ 525,000
Federation local and national programs, services and operations (e.g. PJ Library, MOL, P2G, birthright, Hillel)	\$ 1,348,569

- More than \$600,000 of the Designated gifts (which are not consistent from year to year) are designate to local organizations. \$230,645 are designated to beneficiaries with no restriction on how they will be spent.

Committee experience and potential conflicts: The Committee is comprised of various individuals who have diverse community experience. It is inevitable and valuable that each one has a variety of connections and affiliations with one or more Beneficiary agencies. The members declare associations during the process, e.g. relatives who are on boards, or past board involvement in a Beneficiary board. Conflict of interest guidelines for the Committee require that no member be currently involved in a Beneficiary board of directors.

Information relevant for deliberations: The Committee considers a wealth of information provided by agency leadership and tracked over time that informs them on:

- the depth of need for programs/services;
- the need for Federation funding; and
- the impact of those dollars on the organization and on the community.

In addition to the description of the programs and services of each agency, the Committee reviewed:

- reserves, surpluses, and current financial position;
- diversity of funding sources;
- dependency of the agency on the allocation (% of total revenue) ranging from 0.8% to 25%;
- impact of the funding, both qualitative and quantitative;
- allocations history;
- the agencies' expressed needs for Federation funds to support programs and services not funded by other sources;
- campaign briefing on fundraising trends, designated gifts, and donor feedback; and
- priorities from the Community Forward planning process

Cross Communal Collaborations

Cross communal collaborations, communications and partnerships are stronger than ever as organizations continue to meet and regularly find ways to work together.

There is precedent for an agency managing a community-wide program that is not one of their own core priorities. For instance, Gray Academy houses the Kaufman Silverberg Library and provides community access that goes beyond school use and hours. They receive additional funding to facilitate community access as a Jewish public library. Similarly Jewish Child and Family Service (JCFS) manages the Chaplaincy program on behalf of the community.

The agencies had an unusual situation this year. The **Senior Concierge** service is completing the second year as a pilot program that was a collaboration of Federation (instigated by the Sub-committee on Aging to fill a longstanding need for senior outreach work) with the senior serving agencies in the Jewish community. By agreement, JCFS took on the management of this program through its pilot period with grant funding acquired by Federation and JCFS from three major sources. It is now ready to transition to an ongoing function. The evaluation of the program demonstrated its value and success, but the parties involved agreed it was best placed with the Gwen Selter Creative Living Centre (GSCLC) at this time. During this transition from full to partial grant funding, the request came to Allocations to address this program separately as it transfers to GSCLC.

News this year

Every year there are changes in beneficiary board presidents and sometimes in staff. This year there were a number of significant changes.

Two agencies taking a hiatus this year

Both the Jewish Learning Institute and Irma Penn School of Jewish Learning are experiencing staffing challenges.

- **Jewish Learning Institute** is finishing the current season with remote programming but will have to resolve staffing before establishing what the program will look like going forward. We wish Rabbi Shmuly and Adina Altein well in their new endeavours.
- **Irma Penn School of Jewish Learning** lost their newly recruited teacher just before the school year began and was not able to find a replacement mid-year. They will begin to recruit again this spring for the fall and will use the dollars that have been reserved from previous allocations to fund the next year. We wish them much success in re-establishing the school for 2022-23.

Significant Agency changes this year include:

- **Camp Massad** experienced the tragic loss of their president Marcelo Lubocki z"l. The Committee wish them and the family sincere condolences. And, of course, welcomed Josh Winestock as their new president.
- The Committee welcomed **Shalom Residences'** new Executive Director – Mike Goldberg and wish Nancy Hughes well in her retirement after 30 years of extraordinary service. Nancy built an agency that is a model in the Canadian community as well as the North American Jewish community. A hearty Yasher Koach to Nancy for all her work.

Beneficiary Agencies Highlights and Needs

Pandemic Recoveries and Overall Trends: The Winnipeg Jewish community benefits from strong Beneficiaries that found creative ways to serve their constituencies in the face of restrictions on service, safety and health concerns. They are all budgeting and planning for more “normal” years of service in the next year. However, each agency has a Plan A and a Plan B and a variety of scenarios that are on their radar, having learned to expect uncertainty. Every agency expressed cautious optimism about the year to come as well as concerns:

- Concern about inflation and rising supply costs, specifically food, gas, and biodegradable packaging;
- Each agency is coming into the next year in a good financial position, some with significant surpluses because of government subsidies and foundation grants during the pandemic, fortunate but not likely to repeat;
- There continue to be some additional costs associated with fewer people allowed in the same spaces, hybrid/online service costs, heightened attention to cleaning, etc.;
- Several agencies mentioned wanting to use surpluses to build their reserves as they look forward to leaner years with expected reductions in membership and fee revenues, while they re-build programming and fundraising revenues;
- There is concern around the pace of resumption of in-person participation and attendance, and willingness to pay at pre-pandemic levels as in-person programming resumes, all affecting overall revenue;
- There is a general concern about bringing back families, students, campers, members that have not been vaccinated and who may feel alienated. And a similar concern about those who feel vulnerable and may choose to stay away from in-person activities once mask and vaccine mandates are lifted in community venues;
- They are opening back up for in-person programs and field trips etc. but with lots of alternative plans;
- Teen mental health is a emergent concern everywhere;
- Providing competitive wages to recruit and retain staff is a concern in most agencies; and
- Those awaiting government funding from MB starting April 1, 2022 have not received confirmation from relevant government departments.

Welcoming Jewish environments: Creating Jewish environments for everyone who participates is a clear value and practice across all the Beneficiaries. Everyone serves Jews and non-Jews, sometimes in the same family, sometimes in friendship groups and some who come to see Jewish community services as highly valued for themselves or their family regardless of ethnocultural background.

Diverse participants support the Jewish nature of the offering with Jewish holiday celebrations, kosher food, religious education, Israel engagement, diverse ethnocultural customs and more.

Allocations to build Jewish education and identity in youth:

Aleph Bet Child Life Enrichment Program: Originally Aleph Bet came to Federation for enough funding to purchase Jewish/Hebrew early learning materials. They have grown into a significant agency that provides a Jewish environment for early learning from babies to school age. They require annual funding to: build community through events both in house and by participating in other community events, e.g. Chanukah concert in house instead of in a theatre they couldn't afford, enhanced virtual platforms if necessary; transportation to Gwen Secter Creative Living Centre and other community sites; enhanced communications systems with parents and staff.

Resident Summer Camps: Each of the camps are unique in North America, both serving children from across the diversity of Jewish community, each with their own unique character and attractions. To provide the transformative Jewish experience that feeds lifelong Jewish identity and community leadership, the camps need annual funding to:

BB Camp:

- Pay staff at competitive rates to attract and retain staff who build Jewish content;
- Provide them with significant training in inclusion, health and safety, etc.; and
- Support campers who need subsidy to attend.

B'nai Brith Jewish Community Camp is the only Jewish wilderness camp of its kind.

Camp Massad:

- Subsidize those families who can not pay the full cost to ensure children have access to this profound Jewish experience;
- Acquire programs and counsellors who build Jewish content; and
- rebuild camper engagement after 2 years of being restricted from having children at overnight camp in Manitoba.

Camp Massad is the only Hebrew speaking camp in North America.

Gray Academy of Jewish Education: The value of Jewish day school in building Jewish identity and Jewish leaders is well known. Federation “partners” with parents who cannot pay the full rate to make Jewish education accessible. The allocation will support the restoration of Jewish experiences that build Jewish identity and community building, as well as experiences that enhance student mental health and wellbeing after 2 years of isolation.

Kaufman Silverberg Library: Ongoing funding provides public access and hours beyond school days to operate as a Jewish public library.

Gray Academy was praised for its safe school practices and hybrid learning model, a pivot enabled by plans for online learning pre-pandemic. It continues to be able to include children who are at home due to illness in the family.

Allocations to serve the most vulnerable:

Jewish Child and Family Service: The agency uses “sustaining funds to sustain the community with lovingkindness”, providing “womb to tomb caring” for the most vulnerable in our community. They currently serve about 5000 people each year. Federation funds work not supported by other sources include the rapidly growing caseload of seniors, addiction recovery supports, mental health services and a new and growing crisis in teen mental health. Having this robust agency that MB mandated for child welfare, and Federally supported for immigrant resettlement allows them to adapt to current needs.

Chaplaincy: Jewish spiritual care for hospital patients, those who are incarcerated, personal care home residents across Winnipeg.

Anxiety and mental health challenges are at an all time high for youth, as well as stress on families who have children with various disabilities. Teen mental health has been identified as a growing need by JCFS, the Gray Academy, BB Camp, and Camp Massad.

Gwen Secter Creative Living Centre: The Winnipeg Jewish community has a large and growing proportion of seniors of “Baby Boomers” age, individuals who may experience increasing isolation after they retire and as their families and friends diminish in number and scatter around the world. The agency addresses isolation of seniors with programming that include the key components of kosher food and Jewish culture that create connection with Jewish community. They now use online platforms as well as in-person offerings and run transportation programs to bring seniors to programs as a new medical transportation program in partnership with JCFS. The success of this program fills a pent up need predating the pandemic.

Kosher Meals on Wheels: Now in house for the first time, KMOW reaches seniors in their homes with healthy, kosher food at an attainable price, social contact with the volunteers who deliver, and information that comes with the tray. By bringing it in house they are able to serve more people at lower cost and better match food choices to tastes.

GSCLC pivoted to deliver 35,000 meals in one year during the pandemic. With a proven capacity for 600 meals per week they are now over 560 KMOW in December and growing.

Senior Concierge: This pilot program moves to GSCLC to provide community wide outreach and referrals to reduce isolation of this growing number of seniors as well as coordinating transportation programs e.g. the Taxi Voucher Program for winter rides (previously housed at the Rady JCC) with Medical transportation rides.

Shalom Residences: Housing and supporting adults with primarily intellectual disabilities, Shalom Residences’ annual allocation supports Jewish programs and cross communal engagement.

Shalom Residences, Gwen Secter Creative Living Centre, and Jewish Child and Family Service are partnering to create better access for adults with intellectual disabilities.

Saul and Claribel Simkin Centre: As a Beneficiary, the Simkin Centre’s participation in Jewish community life has grown. The allocation funds High Holiday services and kashrut supervision to support the Jewish character of the home.

The Simkin Centre has received press across the country as a leader during COVID, with their parades for recovered residents as they came out of isolation.

A note about Inclusion: Every agency can speak to accommodations made and efforts ongoing to be inclusive of diverse populations within the community. Financial aid, physical accommodations and renovations, inclusive policies and practices and specialized programming were evident. For instance:

Camps report pathway upgrades for those with physical limitations as well as gender neutral bathrooms.

The Rady JCC offers specialized programs for adults, teens, and children with disabilities.

All of the educational environments from daycare to high school serve and integrate students with special needs.

Allocations to build cultural life:

Jewish Heritage Centre of Western Canada: Sustaining the preservation of Jewish community heritage through professionally handled archives, providing Holocaust education and teacher training and representing the Jewish community in cross cultural forums.

Rady Jewish Community Centre: After two difficult years the Rady JCC is looking forward to rebuilding Jewish cultural programming for all demographics, from early learning (childcare) to key cultural series for retirees, including teens, families, and adults. Federation allocations sustain these programs that are not separately sponsored, and a portion of the infrastructure required to engage the breadth of the community.

Virtual Programs will continue. All cultural programmers learned the virtue of virtual over the last two years and are considering keeping some aspect of online or hybrid delivery for culture and education offerings:

Gwen Selter Creative Living Centre's online platform attracted more than 800 subscribers.

The Jewish Heritage Centre's online programs attract hundreds of live attendees as well as hundreds more "views" on YouTube.

Recommended Allocations

The amount of the annual allocation is not a reflection of how the Committee and the community value the service that each agency provides, rather a reflection of current financial need. Special attention was paid to rising needs in some areas this year, as well as surpluses current and projected. Funding levels are not guaranteed from year to year and will continue to fluctuate based on balancing needs.

The Committee wants to encourage the community to contribute generously to the CJA campaign with unrestricted gifts that sustain essential community programs and services from year to year.

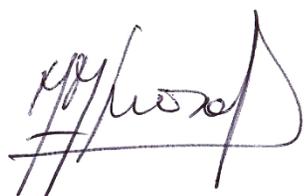
The recommended allocations approved by the Board of Directors at its meeting of May 25, 2022:

		2022/23	2022/23	2021/22
Beneficiary Agency		Recommended Allocations	Request	Actual Allocations
Aleph Bet Child Life Enrichment		10,000	15,000	10,000
B'nai Brith Jewish Community Camp		85,000	110,000	80,000
Camp Massad		70,000	70,000	70,000
Gray Academy of Jewish Education		974,000	1,070,000	1,000,000
Kaufman Silverberg Library		<u>40,000</u>	<u>58,500</u>	<u>40,000</u>
Total to Gray Academy		1,014,000	1,128,500	1,040,000
Gwen Secter Creative Living Centre		105,000	125,000	100,000
Kosher Meals on Wheels		45,000	45,000	45,000
Kashrut Mashgiach		<u>10,500</u>	10,500	<u>10,500</u>
Senior Concierge - transitioning from JCFS		<u>20,000</u>	<u>20,000</u>	
Total to Gwen Secter Creative Living Centre		180,500	200,500	155,500
Irma Penn School of Jewish Learning	No application in 2022		0	7,900
Jewish Child and Family Service		900,600	910,600	880,600
Chaplaincy		<u>54,400</u>	<u>54,400</u>	<u>54,400</u>
Total to Jewish Child and Family Service		955,000	965,000	935,000
Jewish Heritage Centre of Western Canada		78,500	82,000	79,600
Jewish Learning Institute	No application in 2022		0	10,000
Rady Jewish Community Centre		540,000	565,000	540,000
Shalom Residences		45,000	45,000	40,000
Simkin Centre		25,000	34,980	35,000
Total requested/allocated to Local Agencies		3,003,000	3,215,980	3,003,000
Funds Available for Local Allocation		3,003,000	3,003,000	3,003,000
Requests in Excess of Funds Available		0	212,980	0

A Final Note from the Chair

I would like to extend a heartfelt thank you to the CJA campaign for their contribution to this incredibly successful campaign; to the JFW Executive and Board for their leadership and guidance; to the JFW staff for their support and tireless work; to the CJA donors for making a difference in our community; to our beneficiary agencies for their achievements, passion and the tremendous impact that they make on so many people. Finally, I want to thank the Allocations Committee members for their service to the community and bringing your passion, intellect, insight, and experience to the discussions around our virtual table.

Sincerely,

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

Marcelo Aprosoff, Chair

Allocations Committee 2022:

Marcelo Aprosoff, Chair
Brent Schacter, Vice Chair
David Carr
Carol Duboff, Chair, JFW Community Planning
Jeff Lieberman, Jewish Foundation of Manitoba
Ellie Silver, JFW Finance Chair
Gayla Guttman, Women's' Philanthropy Co-Chair
Carrie Shenkarow, CJA Top Donor Chair
Daniel Jacobowitz
Gavin Rich
Jack Hurtig
Leo Blankstein
Gustavo Zentner, President

JFW STAFF:

Elaine Goldstine, CEO
Faye Rosenberg-Cohen, Chief Planning and Allocations Officer
Rebecca Brask, Chief Development Officer
Graciela Najenson, Donor Development Director
Evelyn Orlovitz, Donor Relations & Program Manager

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

THE **STRENGTH** OF A PEOPLE.
THE **POWER** OF COMMUNITY.

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