

Jewish Federation of the Lehigh Valley  
Allocations Committee

**Guidelines for Completing 2020-2021 Allocation Requests**

**DEADLINE FOR SUBMISSION: Monday, March 16, 2020, end of day**

This information has been designed to bring together the necessary information required for the Jewish Federation of the Lehigh Valley Allocations Committee to appropriately review the allocation requests for beneficiary agencies. The information requested is designed to provide an orderly approach for the presentation of the information required.

**Please note that this year's allocations process will be managed electronically. You will be able to download and complete the application request.**

**Upon completion, please email your allocation request to Jeri Zimmerman.**

**You may visit the following link to access the allocations application form:**

<https://jewishlehighvalley.fedwebpreview.org/allocations-application-resources>

**If you have any questions, please feel free to contact Jeri Zimmerman at 610-821-5500, or [jeri@jflv.org](mailto:jeri@jflv.org).**

Please complete each section of the Allocations Application in its entirety. You will be notified if the Allocations Committee desires additional information or has cue questions in advance of our meeting.

**1) Agency Information and Program Viability**

- a) In an organized and concise format, please outline service delivery statistics and management information data enabling an informed understanding of your organization's services and programs.
  - i) Summary data should be provided for key service categories, programs, and/or department activity, comparing current year (2019-20) to prior year.
  - ii) Schools are required to provide grade by grade enrollment for the current 2019-20 year, as well as projections for the 2020-21 proposed year. Tuition and fees summary data should also be included
  - iii) Briefly identify your agency's top 3 achievements and top 3 challenges of the last year.
- b) To best understand your plans for the coming year, please identify your major plans for 2020-21 including service priorities, new initiatives, special projects, program cutbacks or eliminations.
- c) Agency staff structure. Please provide a summary analysis of your organization's staff by category and/or department noting full-time equivalents (FTE) and any planned changes for 2020-21.

**2) Budgetary/Financial Information**

- a) **Financial statements/budgets** reflecting the following:

- i) Last fiscal year (2018-19) actual expenses and income (12 months)
- ii) Current fiscal year (2019-20) approved budget (12 months)
- iii) Current fiscal year (2019-20) actual/estimate operating budget (12 months)
- iv) Coming fiscal year (2020-21) proposed budget (12 months)

**Financial information is preferred in landscape-oriented, spreadsheet format, with the columns consistent with the four (4) categories above.** Temple Coldren is available should you have any questions, 610-821-5500, ext. 324 or [controller@jflv.org](mailto:controller@jflv.org). It is preferable for budget lines to be grouped by category, e.g. personnel expense lines grouped together as opposed to being dispersed throughout the spreadsheet. Subcategory subtotals are at your discretion. Total Expenses and Total Revenue must be totaled.

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- b) Summary outline of **significant increases or decreases** in your organization's finances. Rather than a line-by-line analysis, please highlight the significant variances and changes in your budget. What factors constitute the major variance between your current year operating budget and your current year actual/estimated budget? What are the more significant changes, up or down, in your proposed (2020-21) budget?
- c) Please outline your organization's fundraising efforts, programs, and events. **Fundraising programs/events should be itemized noting the approximate dates, activity description, estimated receipts (goal).** [Submission of this information does not imply Federation endorsement of the agency's fundraising plans. **Agencies are expected to respect the primacy of the Federation's annual campaign. Significant fundraising plans, or dramatically changed fundraising plans must be reviewed with the Federation.**]
- d) **Independent financial audit** (if applicable) for the most recently completed fiscal year, or a certified financial statement for that year. Organizations that do not have an independent financial audit will be asked to submit additional information about their fiscal controls and financial accounting systems.
- e) Auditor's issued **Management Letter** for the most recently completed fiscal year, submitted **confidentially and exclusively** to the Federation Controller, Temple Coldren – [controller@jflv.org](mailto:controller@jflv.org)
- f) Agencies operating in **surplus or deficit situations** should articulate reasons for the variances. If the agency ran, or intends to run, a surplus, the agency must inform the Federation how it intends to apply the surplus funds. If the agency ran, or intends to run, a deficit, the agency must inform the Federation how it intends to manage the deficit. Agency plans to address any accumulated deficits must also be submitted.

**DEADLINE FOR SUBMISSION: Monday, March 16, 2020**

### **3) Community Impact Grants**

Since we will not be accepting Community Impact Grants (CIGs) or Israel-themed Community Impact Grants (I-CIGs), we ask that any new program or project be incorporated into your total allocation request and it should be highlighted to indicate opportunities to align with the Federation's Strategic Plan **or** to your organization's strategic plan.

### **4) Application to JFLV Strategic Plan**

In October 2012 the Jewish Federation completed a Strategic Plan seeking to create a Jewish community which is more caring, engaging, and learning. Six (6) key broad goals were articulated and are summarized below:

- *Transform the Jewish Community Center into a vibrant hub of communal life that engages the Jewish community from throughout the entire Lehigh Valley.*
- *Engage more adults to actively participate in Jewish communal life through programming focused on life-long learning and enrichment across generations and forms of Jewish identity.*
- *Strengthen Jewish education and experiences offered to youth who do not attend the Jewish Day School.*
- *Assure the Jewish Day School's long term sustainability by creating an educational experience that more parents will chose for their children.*
- *Expand the availability of formal and informal supportive services to older Jewish people that allow them to maximize their well-being and independence and be connected to Jewish life.*
- *Develop a new approach to fundraising that results in more, sustained giving in support of community activities.*

A complete copy of the Strategic Plan can be found at:

<https://d2sghkvizede3b.cloudfront.net/fed-8/2/Jewish%2520Community%2520Strategic%2520Plan.pdf>

The full report provides greater articulation and specific objectives in each of the six (6) broad goals. Several implementation task forces are underway to identify program priorities.

Beneficiary agencies are urged to review the Strategic Plan and identify how their services and programming furthers the implementation of Strategic Plan goals. The Federation will look keenly at program revisions, new service initiatives, and Community Impact Grant requests which address the Strategic Plan goals and enables forward progression toward our Jewish community being more caring, engaging, and learning.

### **5) Organizations without IRS 501(c)(3) status**

Organizations without IRS 501(c)(3) status wishing to apply for funding must "team" with an IRS 501(c)(3) Jewish agency or institution that will serve as administrator. All IRS 501(c)(3) Jewish agencies and

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institutions serving as administrators must be recognized by the JFLV. A description of the relationship between the two organizations should be submitted.

## **6) Support of the Jewish Federation's Annual Campaign**

**It is expected that all board members of local recipient agencies be members in good standing of the Jewish Federation of the Lehigh Valley. Beneficiary agency leadership is encouraged to actively support the Federation's annual campaign. The Allocations Committee would like to know how the agency and its leadership promote the Federation and the Federation annual campaign to the agency's board, members, and constituencies.**

## **7) Distribution Schedules**

### **a) Distribution Schedule:**

- i) Based on the amount of your awarded unrestricted allocation, allocation payments are typically made monthly, quarterly or bianually; the award letter will specify your specific allocation distribution schedule.**
- ii) Agencies may request alternative payment schedules. A revision to the allocation payment schedule is at the discretion of the Federation and modifications should not be assumed. The Federation will provide written confirmation of your distribution schedule.**