

BENEFICIARY AGENCY APPLICATION GUIDELINE

JEWISH FEDERATION OF GREATER NEW ORLEANS

2020

Definition of a Beneficiary Agency:

- An agency that receives a beneficiary allocation from the Jewish Federation
- A federally registered not-for-profit organization
- An organization with a primary mission to serve Jews, the Jewish people, or Jewish institutions
- An organization that does not show preference and/or discrimination for Jews of any recognized Jewish denomination over another recognized Jewish denomination or unaffiliated Jews and
- An organization that does not cause harm, defame, or embarrass the interests of the Jewish Federation of Greater New Orleans, Israel, or the Jewish people

Allocations Process:

On **Thursday, September 12, 2019** the Jewish Federation of Greater New Orleans' annual allocations process will open to organizations interested in applying for Beneficiary Agency funding.

An announcement will be posted on the Jewish Federation of New Orleans' website. Announcements will be sent out electronically in the Federation's newsletter. The announcement will detail eligibility for funding as a Beneficiary Agency and will include information to access an electronic version of the Beneficiary Agency Application Questionnaire.

Applications:

- The deadline for electronic and/or paper application submission to the Allocation Committee is **Friday October 4, 2019**. **Please note: This year there is a much tighter turnaround than in previous years.**
- Applications should include budget information as required in the chart on Page 3.
- Supplemental documents supporting the applicant's case for funding may be attached to the application as addendums.
- The sub-committee on Beneficiary Agencies will review applications and determine recommendations to the full Allocations Committee.
- Recommendations will consist of both a monetary amount (if applicable) and a recommended designation of Local, Regional, or National status.
- All **returning applicants** must complete and submit a standardized qualitative and budget evaluation detailing their achievements (or lack of achievements) and expenditures associated with their prior year's allocation. This standardized evaluation must be submitted before the Jewish Federation considers another allocation application. Please see Template for Standardized Evaluation below.

Criteria for Funding:

To receive financial support as a Beneficiary Agency, an agency will:

- Maintain a responsible management with a board of directors or administrative committee
- Cooperate with other agencies in preventing competing efforts and services to the community
- Use the allocation received for programs stated in the organization's Beneficiary Agency application
- Make the agency's acceptance and use of funding and grants public to their members and constituencies
- Be encouraged to coordinate any significant campaign or solicitation of financial assistance for current operating needs or any campaign for capital, endowment, or other special purposes with the Federation
- Furnish detailed statements showing all income and expenditures, assets, and liabilities, including requested statements of activities, and
- Keep accounting books open to inspection by a representative of the Federation.

The Allocations Committee shall make allocations based on the following criteria:

- The agency's importance to the New Orleans Jewish community
- The importance of the Federation's allocation to the applying agency
- The agency's anticipated impact on the local community
- The opportunity costs of not funding the agency

Preference will be given to local organizations. Preference will also be given to collaborative efforts among local organizations.

Grant Awards:

After approval by the Jewish Federation's Board of Trustees, the Planning and Community Resources Manager will process allocation awards. Checks will be mailed to awardees no earlier than January 1, 2020.

Allocation awards up to the amount of \$2,000 will be paid in one installment. Allocation awards exceeding \$2,000 will be paid in two installments.

The first installment will be paid at the beginning of the 2020 calendar year. The second installment will be made no earlier than six months after the first installment and upon review of a completed **Standardized Mid-Year Review Report** detailing the Beneficiary Agency's achievements (or lack thereof) and expenditures associated with the allocation. Agencies that do not complete the Standardized Mid-Year Review Report to the satisfaction of the Beneficiary Agency Sub-Committee are subject to forfeit the agency's remaining allocation and the Beneficiary Agency's status for upcoming years will be re-evaluated.

Application Requirements		
Applicant Designation	Application	Last completed FY Actuals, Current Year Actuals to Date, and Proposed Upcoming FY Organizational Budget
Local requesting \$999 and under	Yes	Yes
Local requesting \$1,000 and above	Yes	Yes
Regional requesting under \$1,999	Yes	Yes
Regional requesting \$2,000 and above	Yes	Yes
National/Overseas requesting \$4,999 or less	Yes	Yes
National/Overseas requesting \$5,000 or above	Yes	Yes

Projected Schedule:

Application Deadline: October 4, 2019
 Allocations Committee: November 6, 2019
 JFGNO Board Approval: December 10, 2019
 Allocation Disbursement: January 6, 2020

Please contact Michelle Neal with any questions: michelle@jewishnola.com or 504-780-5604. Thank you.



Template of Standardized Evaluation

In a narrative, please include the following in the evaluation:

1. Name of Program funded
2. Program description
3. Completed program dates
4. Future program dates
5. Short program evaluation
 - Numbers served.
 - What went wrong?
 - What went right?
 - Did you reach your goals?
 - Were there any unexpected results?
 - Were there any challenges that prevented you from reaching your goals?
6. Program budget

Your evaluation should be submitted in a Word or PDF format.

Please submit this evaluation with your Beneficiary application.



Jewish Federation
OF GREATER NEW ORLEANS

Beneficiary Agency Allocation Application

Agency Name: _____

Contact Name: _____

E-Mail: _____

Telephone: _____

Mailing Address: _____

Please check a designation: Local Regional National

Main service(s) provided: _____

Agency's core mission: _____

Has the organization received funds from JFGNO? _____

If yes,

1. In what year was JFGNO funding last received? _____

2. How many years has the organization received JFGNO funding? _____

3. What amount did your organization receive in the last year it was funded? _____

Amount Requested _____

Percent of total program budget _____

Percent of total organization budget _____

How does the organization intend to spend the allocation?

If the Jewish Federation can only allocate a partial amount of the request, will the agency still operate its proposed program?

How would the proposal be impacted? _____

If the Federation does not provide an allocation, what would be the impact for the local Jewish community and the wider Jewish community/non-Jewish community?

What are the proposed benefits to the local Jewish community? _____

Why should the Jewish Federation of Greater New Orleans allocate to your agency?

Submission of this application signifies consent of the applicant agency to abide by the standards and expectations of the Jewish Federation of Greater New Orleans' Beneficiary Agency status. These expectations include, but are not limited to, post-allocation evaluations and the attached requirements for Beneficiary Agencies.