



Jewish Federation
OF GREATER SEATTLE

MEMORANDUM

DATE: September 12, 2011

TO: Community Agencies

FROM: Jack Almo, Chair and Dan Lowen, Vice Chair, Planning & Allocations Committee

RE: **Letter of Intent for FY 2013 Allocations Process**

As most of you are aware, the Jewish Federation of Greater Seattle has recently devised a new fundraising model that allows donors more choice. To ensure our community's needs are best met, the Planning & Allocations Committee created a new grant-making model that dovetails with this new fundraising strategy. We are excited about the new possibilities which exist in this new model as it opens the allocations process to many more agencies whose programs/projects will meet the new allocations priorities and goals, thereby moving our community forward.

Accompanying this memo is a series of documents designed to assist each agency in preparing for this new allocations cycle. These documents are:

1. Letter of Intent (LOI)
2. Agency Grant Making Timeline for FY 2013
3. New Philanthropy Model Outline
4. Agency Criteria for Applications
5. Multi-Year Grant Funding Request Guidelines
6. Frequently Asked Questions
7. Grant Assessment Attributes
8. Agreement of Agencies Receiving Grants

Just a reminder, the cycle is being divided into two distinct parts:

1. The Letter of Intent
2. The Formal Allocation Request for proposals which pass the LOI phase (See grant making timeline for deadline)

This memo addresses the Letter of Intent only.

The LOI application deadline is **November 11, 2011**. The application is an editable PDF that must be saved under a different file name on your computer. After completing the application, it should be emailed back to Annie Jacobson at AnnieJ@JewishinSeattle.org. **No additional supporting materials should be sent along with the LOI.**

One further reminder, there are three "on-boarding" meetings – to answer any concerns or questions you may have and be a catalyst for any partnerships to begin forming -- scheduled for:



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September 14, 2011 at 1:30 – 3:00 p.m. - Experiencing Judaism: Birth – Grade 12

September 14, 2011 at 3:15 – 4:30 p.m. - Building Jewish Community: Post Grade 12

September 15, 2011 at 10:00 – 11:30 a.m. - Helping our Community in Need

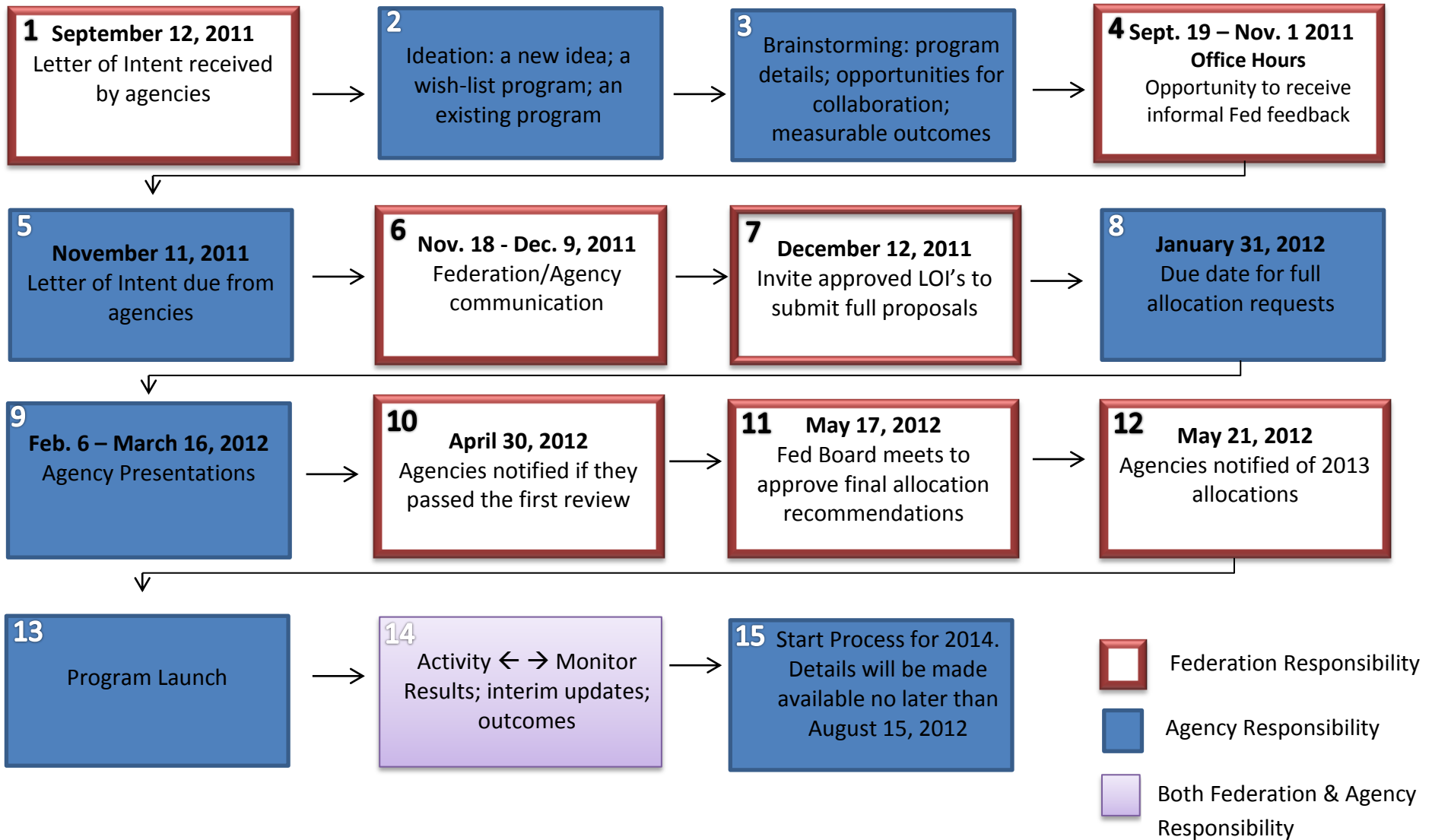
We look forward to seeing you at one of them.

FY2013 Letter Of Intent Packet

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Agency Grant-Making Timeline FY2013



New Philanthropy Model Outline

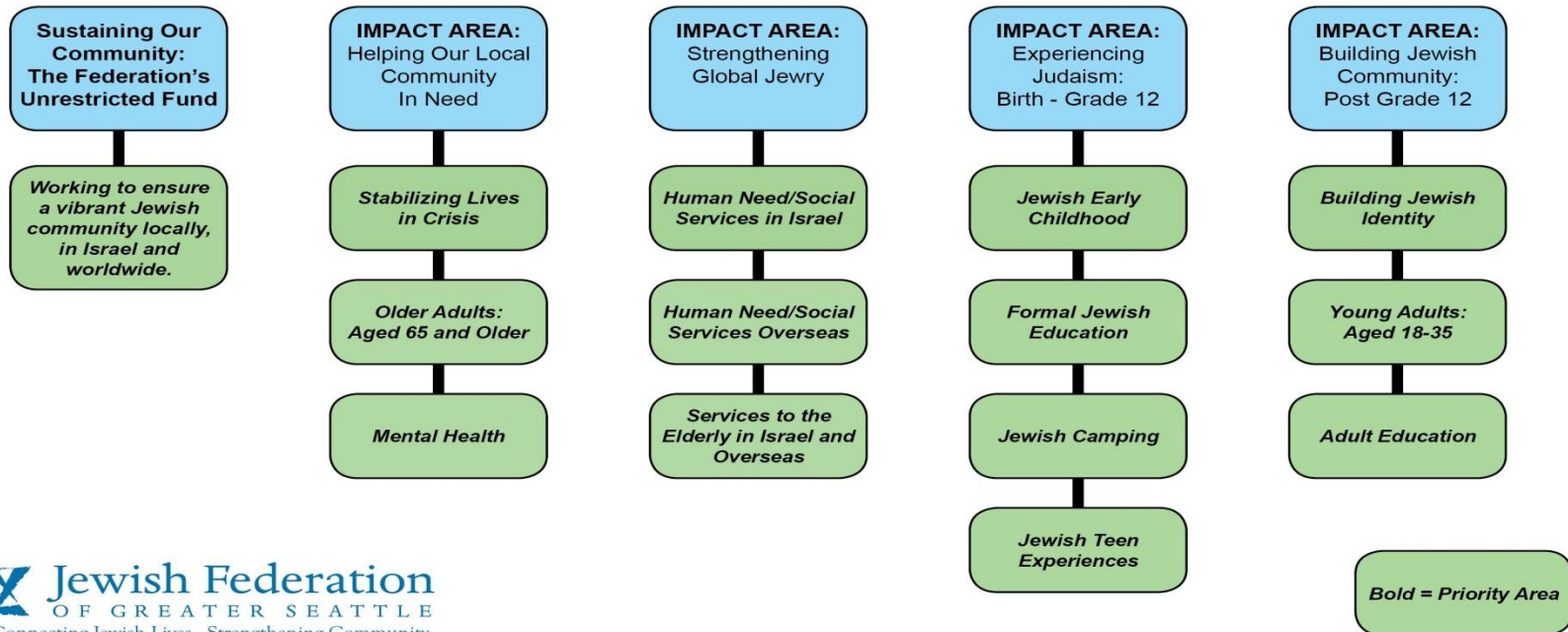
The Jewish Federation of Greater Seattle Your Center for Jewish Philanthropy

The Federation's Mission

The Jewish Federation of Greater Seattle works to ensure a vibrant Jewish community that is connected locally, in Israel and worldwide.

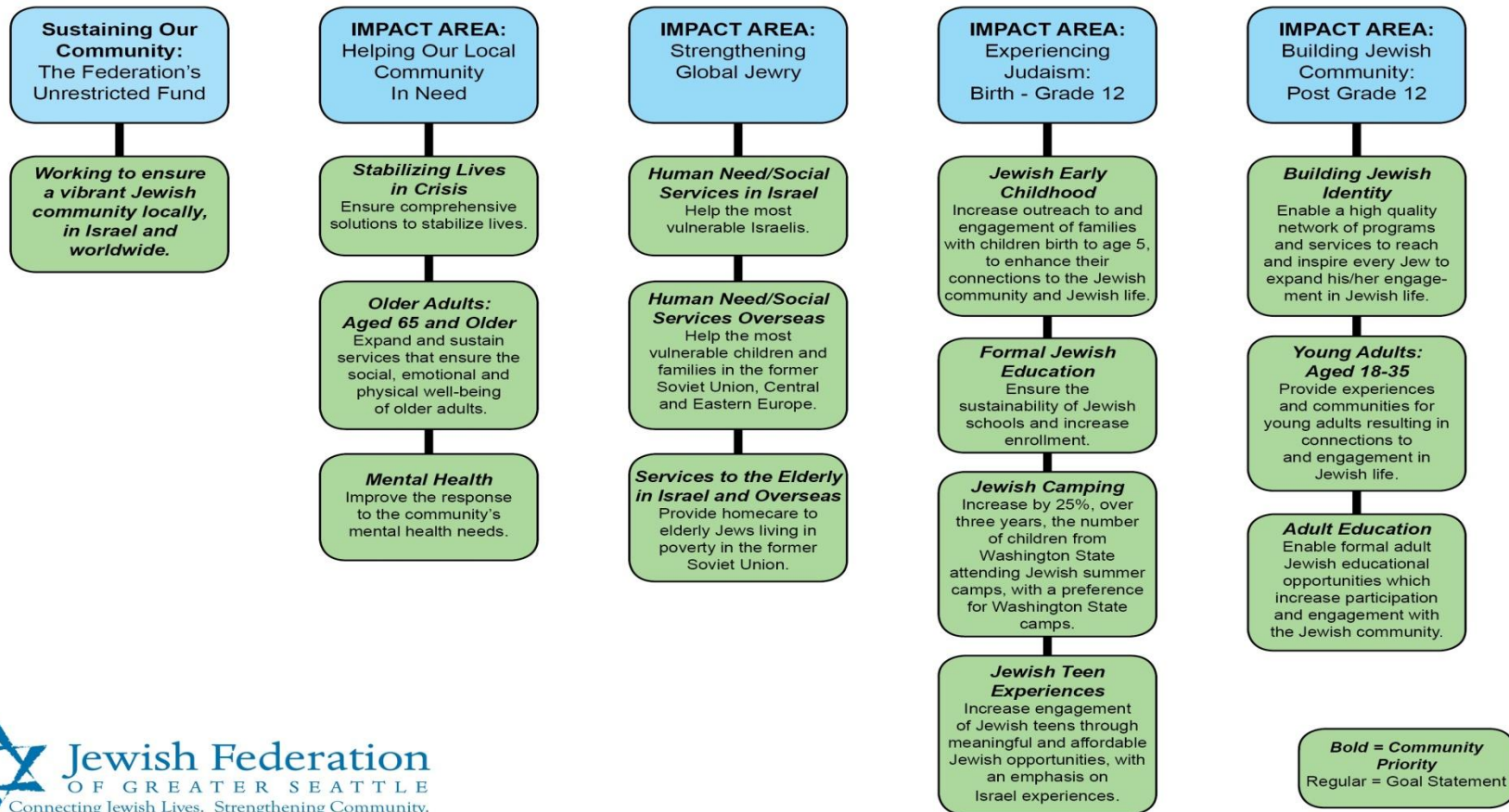
Philanthropic Model

The role of the Jewish Federation of Greater Seattle is to support and stimulate innovative and impactful programs that address community needs and drive collaboration among a diverse set of stakeholders, resulting in a dynamic community offering vibrant expressions of Jewish life.



New Philanthropy Model Outline

Connecting Your Passions to Meaningful Impact in the Jewish Community



Agency Criteria for Applications

To qualify for an allocation from Jewish Federation of Greater Seattle (JFGS), an agency must meet the following criteria. A qualifying agency must:

- Be a 501(c)(3), as defined by the Internal Revenue Code
- Complete an annual audit or financial review
 - A written statement prepared by a qualified tax professional, reviewed by Agency's Board of Directors, that includes an assessment of the agency's financial condition and performance, including both strengths and weaknesses.
- Oversee a program/project that serves either:
 1. Jews in Western Washington **or**
 2. Jews in Israel & Overseas
- Request an allocation under one of the JFGS's four impact areas: (refer to Grant Assessment Attribute document)
 - Helping our Community in Need
 - Experiencing Judaism: Birth – Grade 12
 - Building Jewish Community: Post Grade 12
 - Strengthening Global Jewry

With respect to each allocation request, the following guidelines apply:

- No unrestricted agency operational requests may be made.
- Funding is for individual programs or projects only.
- The administrative costs of running program/projects may be requested as part of the program/project budget.
- Each program/project can only be submitted within one priority area. (Refer to Grant Assessment Attribute document for a list of priority areas.)*
- The minimum funding request is \$5,000 per program or project.
- There is no upper limit on the amount of a funding request for each program/project.
- There is no limit on the number of applications an agency may submit.
- Agencies are encouraged to collaborate and submit joint proposals where appropriate.

*If an agency is unsure about which priority area a program or project falls under, please feel free to contact the Federation's Planning and Allocations Department at 206-774-2243 for guidance.

Multi-year Grants

The Jewish Federation understands that some projects take more than one year to achieve their goals. Therefore, in the new grant-making model, the Federation is offering agencies the opportunity to apply for multi-year grants. The allocation of multi-year grants will be highly competitive.

Multi-Year Grant Guidelines

1. Agencies must elect to apply for EITHER a single-year or multi-year grant.
2. Agencies may request consideration of a multi-year grant for programs/projects which are either:
 - a. A new or pilot program in which the stated goals cannot be achieved in the program's first year.
 - b. An expansion of a current program/project in which the stated goals cannot be achieved in the first year of expansion.
3. Multi-year grants will be funded for a maximum of 3 years.
4. Even if a multi-year grant is awarded, the project/program will be assessed on an annual basis.

FAQ's for New Grant-making Model

Q1. Who is eligible to apply for funding?

Answer: Any agency that is a 501(c)(3), as defined by the Internal Revenue Code, and oversees a program/project that serves either:

3. Jews in Western Washington or
4. Jews in Israel & Overseas

Q2. Are unrestricted agency allocation requests allowed?

Answer: No, only program/project requests may be made. They need to fall under one of the JFGS's priority areas within one of the four following impact areas:

1. Helping our Local Community in Need
2. Strengthening Global Jewry
3. Experiencing Judaism: Birth – Grade 12
4. Building Jewish Community: Post Grade 12

(Please see the Grant Assessment Attributes for a full description of each impact area, priority area and goal statement.)

Q3. What is the difference between an impact area, a priority area and a goal statement?

Answer:

1. *Impact Area*- A broad area of interest to the community.
2. *Priority Area*- A more specific category of need to address, in order to make change within the community.
3. *Goal Statement*- An explicitly defined change in a priority area that will make a difference in people's lives in 3 - 5 years.

Q4. What is the difference between a program, a project and general operating funds?

Answer:

1. A program is a core and ongoing program of an agency.
2. A project has a beginning, middle and end.
3. General operating funds are those required to run the entire agency operation.

Q5. Are only new programs eligible to apply for funding?

Answer: No, current programs that address one of the goal statements within an impact area are eligible to apply.

Q6. Is there a cap on the number of program/project requests an agency can make?

Answer: No, agencies may submit an unlimited number of requests, provided that requests address a stated goal within a priority area.

Q7. Is there a minimum amount of funding an agency can request for each program/project?

Answer: Yes, there is a \$5,000 minimum funding request for each program/project submission.

Q8. Is there a maximum amount of funding an agency can request for each program/project?

Answer: No, there is no upper limit on the amount of funding an agency may request per program/project.

FAQ's for New Grant-making Model

Q9. When is the application deadline?

Answer: The following are the deadlines for the **FY 2013 Allocations Process**

Letter of Intent and Grant Guidelines sent to Community Agencies	September 12, 2011
Letter of Intent Due from Agencies	November 11, 2011
Due Date for Full Allocation Requests	January 31, 2012

Q10. Are multi-year grants available?

Answer: Yes, multi-year grants will be available for either:

- a. A new or pilot program in which the stated goals cannot be achieved in the program's first year.
- b. An expansion of a current program/project in which the stated goals cannot be achieved in the first year of expansion.

Q11. Will agencies which have been beneficiary agencies of the Jewish Federation of Greater Seattle (JFGS) receive preferential treatment in the new grant model?

Answer: No, all agencies will be treated equally regardless of whether an agency has been a beneficiary of the JFGS in the past.

Q12. Is there a source of funding if an agency needs less than \$5,000 for a program/project?

Answer: Yes, there are a few other sources of funds available depending on the needs of the agency.

There are:

1. *Small Agency Sustainability Grants* - for agencies with annual operating budgets of under \$150,000. Grants will be made for up to \$5,000 for unrestricted agency operations. An agency must decide whether it is applying to the regular allocations process or the Small Agency Sustainability fund. An agency may not apply for both. The application timeline will be similar to that of the regular allocations process. (Applications will be available no later than January 31, 2012.)
2. *Small and Simple Grants* – for new, creative, innovative programs/projects. Requests can be made for up to \$5,000. Deadline for submissions is September 28, 2011. An agency may apply through both the regular allocations process (for programs/projects that exceed \$5,000) and the Small and Simple Grants process (for programs/projects that require less than \$5,000.)

(For more information on available grants, please visit: <http://www.jewishinseattle.org/our-impact/grant-seekers.>)

Q13. What kind of assistance is available from JFGS in this new grant-making model?

Answer: JFGS will:

1. Provide agencies with guidance on the best priority area in which to apply for any and all programs/projects.
2. Be willing to review grant applications ahead of formal submission and provide constructive feedback.
3. Offer a grant-writing seminar for RFP to assist agencies with limited grant-writing experience.

FAQ's for New Grant-making Model

4. Provide office hours from September 19-November 1, run by impact area chairs and vice chairs to better connect with agencies. (Appointments will be necessary for office hours, call Annie at 206-774-2243 to make an appointment.)
5. Generally be available to answer any and all questions agencies may have with this new grant model.

Q14. Who do I call with questions?

1. *VP for Planning and Community Services:* Amy Wasser- Simpson
Phone: 206-774-2212 Email: AmyWS@JewishInSeattle.org
2. *Planning and Community Services Coordinator:* Annie Jacobson
Phone: 206-774-2243 Email: AnnieJ@JewishInSeattle.org

Grant Assessment Attributes for Allocation Requests

The Planning & Allocations Committee (PAC) has created four Impact Area Work Groups to assess the allocation requests received by the Jewish Federation of Greater Seattle. The Impact Area Work Groups will evaluate each allocation request based on the attributes that follow. In the assessment process, each attribute will be assigned a weighted percentage as listed below. Each agency is being provided with these attributes in order to assist the agency in submitting effective program/project proposals that best meet the priorities, goals and attributes in each impact area. Successful proposals offer the best chance for moving our community forward in meaningful ways.

Impact Area 1: Helping our Local Community in Need

Help ensure that Jews in the greater Seattle area are thriving, safe and healthy.

Priority: Stabilizing Lives in Crisis

Goal: Ensure comprehensive solutions to stabilize lives

Attributes:

1. The program/project serves the most vulnerable, disadvantaged or under-served populations. **34.4%**
2. The program/project furthers the stated goal(s). **25.8%**
3. The program/project demonstrates measureable impact. **15.6%**
4. Provides a service to the Jewish community that would not be supported by the larger community. **11.8%**
5. The program/project serves a significant Jewish population. (quantitative) **6.5%**
6. Provides a service that does not duplicate existing services already available within the Jewish community. **3.4%**
7. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **2.5%**

Priority: Mental Health

Goal: Improve the response to the community's mental health needs.

Attributes:

1. Provides a service that does not duplicate existing services already available within the Jewish community. **22.7%**
2. The program/project furthers the stated goal(s). **18.5%**
3. The program/project demonstrates measureable impact. **17.6%**
4. The program/project serves a significant Jewish population. (quantitative) **17.6%**
5. Provides a service to the Jewish community that would not be supported by the larger community. **14.2%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **8.2%**
7. The program/project has a plan for overall financial self-sufficiency. **1.3%**

Grant Assessment Attributes for Allocation Requests

Priority: Older Adults: 65 and older

Goal: Expand and sustain services that ensure the social, emotional and physical well-being of older adults.

Attributes:

1. The program/project furthers the stated goal(s). **23.6%**
2. The program/project demonstrates measureable impact. **16.8%**
3. The program/project serves a significant Jewish population. (quantitative) **15.3%**
4. Provides a service to the Jewish community that would not be supported by the larger community. **11.7%**
5. The program/project has a plan for overall financial self-sufficiency. **11.2%**
6. Provides a service that does not duplicate existing services already available within the Jewish community. **9.7%**
7. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **8.1%**
8. The program/project has substantial Jewish content. **2.0%**
9. The program/project serves the most vulnerable, disadvantaged or under-served populations. **1.5%**

Impact Area 2: Strengthening Global Jewry

Help ensure that Jews worldwide are thriving, safe and healthy. Ensure that those in need have enough to eat, a safe place to sleep, and the ability to look forward to a life of hope and dignity.

Priority: Human Need and Social Services in Israel

Goal: Help the most vulnerable Israelis.

Attributes:

1. The program/project furthers the stated goal(s). **22.3%**
2. The program/project serves the most vulnerable, disadvantaged or under-served populations. **22.3%**
3. The program/project demonstrates measureable impact. **19.0%**
4. The program/project serves the Partnership communities of Kiryat Malachi and the Hof Ashkelon Region. **16.9%**
5. The agency has clearly articulated and demonstrated the program/project need. **12.6%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **4.2%**
7. The program/project has a plan for overall financial self-sufficiency. **1.7%**
8. The program/project promotes self-sufficiency. **1.0%**

Grant Assessment Attributes for Allocation Requests

Priority: Human Need and Social Services Overseas

Goal: Help the most vulnerable children and families in the Former Soviet Union, Central and Eastern Europe.

Attributes:

1. The program/project serves the most vulnerable, disadvantaged or under-served populations. **31.4%**
2. The program/project furthers the stated goal(s). **25.8%**
3. The program/project demonstrates measureable impact. **14.2%**
4. The agency has clearly articulated and demonstrated the program/project need. **11.5%**
5. The program/project promotes Jewish continuity. **6.6%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **6.1%**
7. The program/project has a plan for overall financial self-sufficiency. **3.4%**
8. The program/project promotes self-sufficiency. **3.4%**

Priority: Services to the Elderly in Israel or Overseas

Goal: Provide homecare to elderly Jews living in poverty in the Former Soviet Union.

Attributes:

1. The program/project furthers the stated goal(s). **35.8%**
2. The program/project serves the most vulnerable, disadvantaged or under-served populations. **35.8%**
3. The program/project demonstrates measureable impact. **17.7%**
4. The agency has clearly articulated and demonstrated the program/project need. **9.6%**
5. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **1.0%**

Impact Area 3: Experiencing Judaism: Birth to Grade 12

Develop strong Jewish identities for Jewish families and their children and engage them with the Jewish community by providing Jewish education, camping and experiential options for children.

Priority: Jewish Early Childhood

Goal: Increase outreach to and engagement of families with children birth to age 5, to enhance their connections to the Jewish community and Jewish life.

Attributes:

1. The program/project furthers the stated goal(s). **37.9%**
2. The program/project demonstrates measurable impact. (qualitative) **29.2%**
3. The program/project furthers the recommendations set forth in the Jewish Federation's Early Childhood Initiative. **21.7%**
4. The program/project serves a significant Jewish population. (quantitative) **10.1%**

Grant Assessment Attributes for Allocation Requests

5. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **1.1%**

Priority: Formal Jewish Education

Goal: Ensure the sustainability of Jewish schools and increase enrollment.

Attributes:

1. The program/project furthers the stated goal(s). **49.5%**
2. The program/project serves a significant Jewish population. (quantitative) **22.2%**
3. The program/project demonstrates measurable impact. (qualitative) **14.3%**
4. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **12.5%**
5. The program/project engages students in a significant number of hours of Jewish learning. **1.6%**

Priority: Jewish Camping

Goal: Increase by 25%, over three years, the number of children from Washington State attending Jewish summer camps, with a preference for Washington State camps.

Attributes:

1. The program/project furthers the stated goal(s). **41.6%**
2. The program/project addresses financial obstacles to participation. **22.2%**
3. The program/project demonstrates measurable impact. (qualitative) **22.2%**
4. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **10.9%**
5. The program/project serves a significant Jewish population. (quantitative) **3.2%**

Priority: Jewish Teen Experiences

Goal: Increase engagement of Jewish teens through meaningful and affordable Jewish opportunities, with an emphasis on Israel experiences.

Attributes:

1. The program/project takes teens on a meaningful trip to Israel. **37.7%**
2. The program/project furthers the stated goal(s). **28.3%**
3. The program/project serves a significant Jewish population. (quantitative) **17.0%**
4. The program/project demonstrates measurable impact. (qualitative) **15.1%**
5. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **1.9%**

Grant Assessment Attributes for Allocation Requests

Impact Area 4: Building Jewish Community: Post Grade 12

Create a flourishing Jewish community in Seattle with a full spectrum of opportunities for Jewish engagement, involvement & growth.

Priority: Building Jewish Identity

Goal: Enable a high quality network of programs and services to reach and inspire every Jew to expand his/her engagement in Jewish life.

Attributes:

1. The program/project motivates individuals to increase their active participation in Jewish life. **24.8%**
2. The program/project furthers the stated goal(s). **24.1%**
3. The program/project seeks to reach unconnected and/or unaffiliated Jews. **14.3%**
4. The program/project has a plan for overall financial self-sufficiency. **8.0%**
5. The program/project demonstrates measurable impact. **8.4%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **7.8%**
7. The program/project is innovative in its approach. **7.8%**
8. The program/project serves a significant Jewish population. **4.7%**

Priority: Young Adults: 18 – 35

Goal: Provide experiences and communities for young adults resulting in connections to and engagement in Jewish life.

Attributes:

1. The program/project motivates individuals to increase their active participation in Jewish life. **24.8%**
2. The program/project furthers the stated goal(s). **24.1%**
3. The program/project seeks to reach unconnected and/or unaffiliated Jews. **14.3%**
4. The program/project has a plan for overall financial self-sufficiency. **8.0%**
5. The program/project demonstrates measurable impact. **8.4%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **7.8%**
7. The program/project is innovative in its approach. **7.8%**
8. The program/project serves a significant Jewish population. **4.7%**

Grant Assessment Attributes for Allocation Requests

Priority: Adult Education

Goal: Enable formal adult Jewish educational opportunities which increase participation and engagement with the Jewish community.

Attributes:

1. The program/project motivates individuals to increase their active participation in Jewish life. **24.8%**
2. The program/project furthers the stated goal(s). **24.1%**
3. The program/project seeks to reach unconnected and/or unaffiliated Jews. **14.3%**
4. The program/project has a plan for overall financial self-sufficiency. **8.0%**
5. The program/project demonstrates measurable impact. **8.4%**
6. The program/project partners with other agencies to maximize quality and effectiveness of the program/project while minimizing cost. **7.8%**
7. The program/project is innovative in its approach. **7.8%**
8. The program/project serves a significant Jewish population. **4.7%**



Agreement for Agencies Receiving Grants

Approved by Federation Board- June 2011

In exchange for the receipt of any funds from the Jewish Federation of Greater Seattle (JFGS), each agency agrees to follow the marketing, fundraising and communications guidelines below. Each agency agrees to:

- Place the JFGS logo on agency's printed materials.
- Place the JFGS logo on agency's website.
- Verbally acknowledge the grant in any presentation related to the program/project.
- Make a one-time communication to the agency's membership and/or constituency to promote a Federation event. (JFGS will determine and inform the agency which event to publicize.)
- Honor JFGS Primacy*
- Encourage all agency board members to support JFGS through personal contributions and attendance at JFGS events.

Failure to comply with the above agreements may make an agency ineligible for funding in the next grant cycle.

* Primacy means not scheduling an agency's major fundraiser within five (5) days before or after either the JFGS Campaign Kick-off Event or the Women's Philanthropy Connections Event. JFGS will set these dates no later than February 1 of each year for the next fiscal year.

Please note that once a grant is approved, a more formal version of this agreement will need to be signed by the agency executive director and board chair and returned to the Jewish Federation of Greater Seattle.