

Jewish Community Grant/Allocation Request Form

Answers to FAQ's as of 1/8/17

1. How is the application structured?

The first page is intended to reflect **agency** level information only. The program name is on this page to assist each funder's lay and professional reviewers solely for organization purposes. The remainder of the application is focused on the **program** level information.

For financial reporting, applicants are provided with two options on how to submit **agency** level information. The excel worksheet contains two tabs – Agency Budget and Program Budget. Regardless of which **agency** option you select, you must complete the Program Budget.

2. Are the answers limited to the box sizes?

Boxes in section A can be manipulated to accommodate the text that you enter. However, be mindful that the application is limited to 6 pages not including the financial documents requested on the **JEWISH COMMUNITY GRANT/ALLOCATION REQUEST – FINANCIAL REPORT SUBMISSION CHECKLIST**.

3. Do we have to answer every question/section?

Unless noted otherwise, every section should yield an opportunity to share new information with us about your agency and program. Nonetheless, if you believe the section or question is inapplicable, please note that on your submission. That said, it is a perfectly acceptable answer to mark "n/a" in the additional information section!

4. Is there a page limit and what type size should we use?

Yes. Please limit your application to a maximum of six (6) pages PLUS the requested financial information. Please use at least 10pt type, although we would prefer 11 or 12 if possible.

5. How was this application created and will it change again in the future?

The application is the result of input from funders' professionals, committee members who review these applications and agency professionals. As with any document that relies on broad input, there may be items which need further improvement. To that end, each group will be asked for feedback using a variety of means and timing so that each year this format can be improved.

6. What are cash reserves?

A cash reserve is a pool of liquid funds (e.g. cash or other readily available forms) available within an agency to fund expenses beyond what the operating cash flows provide. Some agencies also refer to these as "operating reserves" or "board designated operating reserves."

7. Why are there two endowment questions in the application?

The question on page one requests **agency** level information. Funders are interested in your agency's present and future stability and view the development of endowments and special funds as a positive. We want to develop the most complete understanding of your agency possible within reasonable time constraints. If you have unrestricted endowments and special funds that your board has designated for a specific purpose in the short term, please share that information with us in this section.

The question on page two requests **program** level information. Again, funders view such specially restricted funds as a positive and as part of the whole picture of an agency.

Endowments, special funds or restricted funds (different agencies may use different references) should be reported based on whether they benefit your agency, *regardless of who actually holds the funds* (e.g. a supporting foundation or restricted fund based at the Jewish Community Foundation or other similar entity).

8. Why are there so many questions in place of the extended narrative and matrix?

Between our experience from grants/allocation reviews and the evolution of separate addenda from each funder, these questions are often at the core of understanding the program for which you are seeking funding and how it fits into the overall picture of your agency. We recognize that these may not be all the right questions for every program, so the application retains the broad narrative box as well so you can best educate us about your program, needs and vision.

9. Any tips for answering the questions / narrative?

Glad you asked! Think about how people get information today. Consider a mix of bullet points/summary statements followed by some more detail in narrative on that key point. Don't assume your audience knows everything you've communicated before – members of the committees change over time. Also, while we appreciate your efforts in past applications to integrate Jewish texts and anecdotal evidence of success, with limited space please focus your responses on substantive information about the program.

10. Can you clarify the difference between collaboration, cooperation and partnership?

The collaboration section asks you to share whether you are collaborating with any other agencies – e.g. working together on a program. A good example of a cross-agency collaboration is the Jewish Employment Services program involving JFS and JVS staff and support.

We encourage agencies to cooperate or partner on programs and events – referrals, sponsorships, attendance, and common planning, but consider these concepts to indicate support for each other which stops short of actual program collaboration and service delivery.

11. How do I answer the Funding Impact question?

We acknowledge this question is new and challenging. Try to give us a sense of whether your program is scalable based on funding received or whether there is a go/no go threshold in order for your agency to run the program at all. These discussions occur in our grants committee meetings and rather than speculate about funding change impact, we value your guidance. We have asked about the impact at both the individual funder level and aggregate funder level to allow you to better explain potential impact.

12. What's the Budget Explanation?

You may recall that we are often asking you for additional financial information based on your submittals. We would appreciate your help in anticipating those questions by explaining any material variances. Note that the variances at the agency level are targeted to aggregate income and aggregate expense (and surplus/deficit) while variances at the program level need to be evaluated and explained on a line by line basis. If you have questions about how these criteria apply to your agency and program please contact us. These same criteria apply to adjustments to your current year budget. Finally, you can explain material variances in narrative format OR in footnotes to your financials.

13. How do you define a goal?

A goal is a general statement of the purpose of a program or a program component.

14. How do you define an outcome?

An outcome is what changes as a result of your program and the people you serve. For example, if a program goal is to improve Hebrew comprehension, then an outcome might be described as follows: students who participated in the online study program at least once a week for ten weeks were able to read a comparable passage and obtain scores that were 50% higher on comprehension tests than when the program began. We recognize that some outcomes may be achieved during the grant request period and some may be longer term. Help us understand your vision for both.

15. How do you define an output?

An output is an activity related to your program. For example, the frequency of programs, client interactions, number of clients served, number of scholarships provided and number of volunteers or volunteer hours are all outputs.

16. What do you mean by in-kind support?

Some individuals or companies provide goods and services (e.g. professional services) in lieu of or in addition to direct financial support. For example, if a professional provides legal or accounting

services on a *pro bono* basis or a company donates computers for use in your operations, these constitute in-kind support that should be included if this is of more than *de minimis* value.

17. Why are you asking for more information in Agency Financials Option B?

In our view it's not really more information – these are, generally speaking, the reports from which you would pull the information to complete Agency Option A. The reason we make it an option is so you can run the reports directly out of your accounting system instead of recasting them into the spreadsheet format.

18. When you ask for Program level donor income information on page 5, isn't that the same as the income lines on Exhibit B?

It shouldn't be. The income lines on Exhibit B ask you to aggregate other grants and donations by certain types, excluding specific identification of the four funders using this application format. The additional funder information we would like you to provide in addition to Exhibit B allows us to learn more detail about the donors who provide support for this program but are lumped into the line item(s) on Exhibit B. For example, Foundation Grants – Other and Individual Contributions are aggregate categories that may include some items that are then provided in more detail in the Program level donor income section.

19. If a particular line item on Exhibits A or B doesn't match my agency or program operations (e.g. client transportation) what should I do?

You can replace that line with a definition that better fits the expense line items for your agency or program budget. We seek the most accurate information you can provide within the constraints of the worksheet. However, please do not collapse line items together that reflect breakdowns of categories that you do use (e.g. administrative salaries and professional salaries).

20. What if our agency funds a portion of the program out of general operations in addition to funds raised specifically for this program?

Report this amount in the income section Other and please explain.

21. What if we don't have 10 donors to this specific program (or we raise funds generally and not specifically for this program)?

Only report program specific fundraising, grants or gifts in the Program level donor income information section. Please put N/A or None in the cells you don't need to use.

22. How should we complete the FY 2018 Budget on Exhibits A and B if we don't have a budget in place yet?

If you are far enough into your current fiscal year that you can project next year or have begun initial budget preparation, please use that information to complete this column. If you are more

than half way through your current fiscal year and/or this funding will be for your next fiscal year, we would expect to see such a projection. Please don't hesitate to talk with us prior to grant submission if you have concerns about completing this column.